

## Have you got the right strategies in place for your business to succeed?

## Are you taking steps to ensure your personal wealth is actively managed?

At Knight, we understand it's important for you to reap the financial rewards of your hard work. That's why we take your prosperity and financial security seriously.

Whether you come to us as an individual or a business owner – no matter how simple or complex your needs – we're here to help you take control of your personal finances and achieve business success. Just like we've helped countless business owners and individuals before you.

With access to our diverse team and their broad industry knowledge, you are never far away from a clear solution.

## An authentic approach tailored to your needs

We know that managing your personal or business finances while keeping everything on track can be daunting. But regardless of why you come to us, we'll make the process as simple as possible for you.

We take time to clearly understand your current circumstances and assess your needs. We act as your mentors, guiding you through any issues or uncertainties. Depending on the level of specialist advice required, we connect you to our in-house experts or external professional advisers.

Looking at the bigger picture, not just tax returns or annual financial statements, we apply a holistic solution to connect your financial dots.

Our approach with clients is based on connected and collaborative relationships, built on a foundation of trust and expertise. You can expect total honesty from us – we will tell you what you need to hear, not just what you want to hear.

## Connecting the dots to your desired outcome

- 1 Understanding you**  
We get to know you and your financial position.
- 2 Establish your goals**  
We help you articulate your specific objectives – personal and/or business.
- 3 Paving the way towards financial freedom**  
We plan a way forward and help you implement the strategies.
- 4 Continuous progress into the future**  
We regularly track your progress towards achieving your personal finance and/or business goals.



**Your situation is unique, so our solution is too - you will only receive personalised, realistic and relevant advice from us.**

## How we can help you



### Business services

#### Business management and compliance

It's important to ensure that you manage your cash flow efficiently and comply with relevant legislation. We provide general accounting and taxation advice and can prepare Financial Statements, Business Activity Statements, Income Tax Returns and other Tax Returns on your behalf. We can review your position and provide guidance, where needed, in relation to Goods and Services Tax, Fringe Benefits Tax, Payroll Tax, Other Payroll obligations and Superannuation, along with helping you manage debt and budget your profit and cash flow. Our bookkeeping team can tailor our services to your needs, from a once-off consultancy or training project to a full ongoing service, relieving the need for you to have an internal bookkeeper.

#### Business performance and growth

We provide quarterly and annual business performance reviews, set Key Performance Indicators designed for your situation, and assist you in benchmarking to industry standards. We'll help you measure your business growth with regular business valuations. Depending on your business strategy – growth aspirations or where succession is imminent – we provide merger and acquisition advice, conduct acquisition due diligence, assist in management buyouts and provide sale advice.

#### Business strategy and structure

No matter what stage your business is at, we help with all aspects of your business strategy, structure, succession and risk management.



### Personal services

We want you to be able to enjoy life, with peace of mind knowing you're prepared for a secure future. So we work with you to raise your financial awareness, helping you understand the process and take control of your personal finances.

We can help you to prepare a financial plan focused on maximising and protecting your wealth.

We work with you to design your asset diversification strategies, implement leveraging tactics and regularly monitor your net worth to ensure you're on track with your goals. Managing your financial risks through asset protection, insurance and estate planning are also key considerations in connecting your financial dots.

## Client Story

### Building a better business

A specialist carpentry business approached us for help. Their turnover was strong, but profits were discouragingly low. They felt they were living to work rather than working to live.

We analysed their business finances and operations and benchmarked them against similar businesses in their industry. We then developed an action plan. There weren't any silver bullets. Implementation was going to take time, energy and focus. Our aim was to create the most efficient operation possible.

During the first year, our client's turnover dropped. But profits increased due to their focus on operational and production efficiencies. By the end of the second year, their turnover increased and profits had never been better. Although busier than before, their streamlined business practices enabled them to implement a nine-day fortnight.



### Celebrating 50 years of helping clients achieve their financial aspirations...

At Knight, our company culture is focused on people and trustworthy relationships – with a strong sense of responsibility for the welfare of our clients.

#### Take that first step and talk to us.

Let us get to know you and understand your needs. Let us show you how we can work with you during the twists and turns of life to achieve your financial goals.

Before you know it, you could be just a handshake away from a collaborative journey towards securing your future.