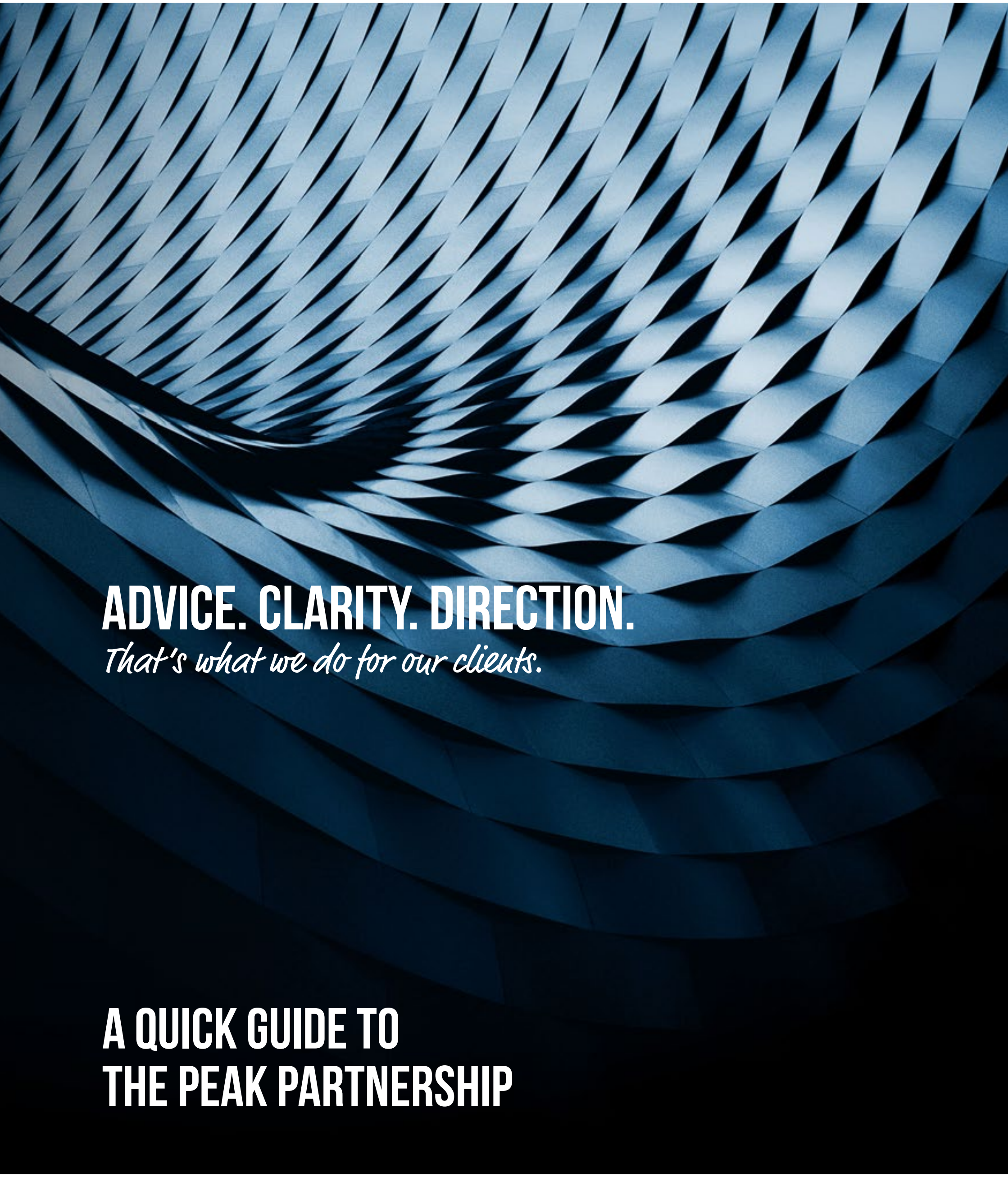


ADVICE. CLARITY. DIRECTION.

That's what we do for our clients.

A QUICK GUIDE TO THE PEAK PARTNERSHIP

The Peak Partnership
Inspiring Performance

WELCOME TO THE PEAK PARTNERSHIP

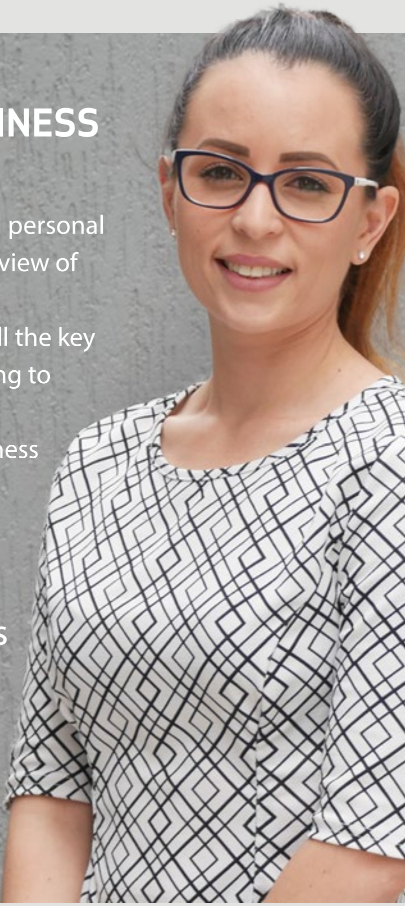
When you're a client of The Peak Partnership – whether it's to help your business grow, manage your personal finances and long-term wealth, or both – you'll have direct access to all our advisory and financial services professionals.

Everything we do is built around **ADVICE**. **CLARITY**. **DIRECTION**. It's our simple, no nonsense approach to help you get where you want to be financially.

WE CAN HELP YOU AND YOUR BUSINESS

Our financial expertise and services include:

- **INTEGRATED ADVICE** – our complete business and personal financial advice solutions, where we take a holistic view of your total financial framework.
- **BUSINESS ENHANCEMENT ADVICE** – addressing all the key aspects of your business, from strategy and planning to tax minimisation and risk management.
- **ACCOUNTING** and **TAX PLANNING** – for your business and personal finances.
- **FINANCIAL PLANNING, WEALTH CREATION** and **WEALTH MANAGEMENT*** – solutions to help you create long-term financial security.
- **SUPERANNUATION** and **INVESTMENT STRATEGIES** – we specialise in self-managed superannuation fund strategy and administration.
- **WEALTH PROTECTION*** – insurance and asset protection strategies, policy preparation and claims management.



As our range of services suggests, we'll work with you towards making your business the best it can be, or help design your personal financial future. Better still, we can create a complete financial strategy for you.

* Peak Partnership Wealth Design Solutions Pty Ltd as trustee for Carlmich Trust. ABN 26 711 439 304. Corporate Authorised Representative No 415154 of Professional Investment Services Pty Ltd. AFSL No 234951. ABN 11 074 608 558.

WORKING TOGETHER WORKS BETTER

Most people, especially those in business, want more from their accountant or adviser. But they're not sure what they want, because they don't know what they don't know.

Our job is to help you fill in those blanks. So as a start, it's helpful to understand how we work and what you can expect from us as your adviser:

OUR SERVICE STANDARDS

- Honesty, integrity and openness.
- Simple and easy to understand explanations.
- Fees that are fairly-priced for the time and complexity of work involved. Our fees can be charged at our hourly rates or at an agreed monthly fee – whatever suits you best.
- The appropriate staff (based on their knowledge and experience) will be assigned to various tasks, so you get the highest quality support and value.
- All your work will be checked by our senior staff.
- In our profession, knowledge is vital – our staff are committed to regular professional development education and training.
- We'll process your work accurately, efficiently, on time.
- Mistakes are rare, but may happen. If we do make a mistake with your work, we'll rectify it as quickly as possible and ensure you're not penalised.
- You'll get a full response to your enquiries the next business day or sooner.
- We'll answer or return all your phone calls as quickly as possible.

MORE FOR YOU

We believe in working with and for our clients to build trusted and effective partnerships, by providing reliable advice and practical, value-added services. These are just some of the additional benefits that cost you no more as a client of The Peak Partnership.

OTHER CLIENT BENEFITS

- PEAK MyAccountants – our free Mobile App with a host of helpful and time-saving functions.
- Regular client newsletters – available in electronic and printed copy.
- Regular and relevant information updates through our email news communications.
- Industry and topic-specific updates that relate to you and your business.
- Regular events – financial information seminars, business development workshops and networking events.
- Client support tools, such as our Financial Fact Sheets, Tax Return Checklists, Tax Guides and Business Travel Expense Guides, and more.
- Access to industry-recognised and award-winning advisers, right across our business.

◀ Cara Halvey, one of our talented Senior Accountants at The Peak Partnership

MyAccountants mobile app

It's the ideal mobile app for any small business on the go. Download it for **FREE** by scanning the QR Code, using **PEAK** as the Code when you install on your device.

REACH YOUR FINANCIAL PEAK
CONNECT WITH US

Here's our leadership team at The Peak Partnership, always happy to share their wisdom with you and our intrepid staff. They're each specialists in their respective field, with an absolute commitment to their clients' financial wellbeing.

DAMIAN KNOBLANCHE Director
Chartered Accountant
CA Business Valuations Specialist

ROBYN HENSHAW Director
Chartered Accountant

BRAD ROBERTS Director
Chartered Accountant
Certified Practicing Accountant

PAT KELLY Director
Financial & Risk Insurance Adviser
Certified Financial Planner

SERVICE	MAIN CONTACT	ALTERNATE CONTACT
Business Strategy Business Planning Accounting Taxation & Planning	Damian Knoblanche	Zoe Gillard Rosemary Buckley
	Robyn Henshaw	Cara Halvey Eleisha Hunt
	Brad Roberts	Erin Loadsman
Business Advice for Sales & Acquisitions	Brad Roberts Damian Knoblanche	Robyn Henshaw
Self-Managed Super Specialists	Pat Kelly	Stephen Nardi
Wealth Design (Financial Planning)	Pat Kelly Jenny Kitching Amir Rodnia	Brad Roberts
Wealth Protection (Risk Insurance)	Pat Kelly Jenny Kitching Amir Rodnia	Brad Roberts
Estate Planning & Succession Planning	Brad Roberts Damian Knoblanche	Pat Kelly Jenny Kitching

CHARTERED ACCOUNTANTS
AUSTRALIA + NEW ZEALAND

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