

KAREN NESBIT

Masters in Taxation Law | Certified Practicing Accountant

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BUSINESS SERVICES MANAGER

Senior Business Services Manager presenting with 6 years notable experience and expertise in the simultaneous management of up to 450 clients from high net worth individuals to major, multi-million dollar national and international business clients working at senior management level. Diverse industries include retail, construction, medical, financial, investment, automobile and real estate. Recognised taxation expert, adept at managing high profile business clients and building client trust.

- Complex Taxation Advice
- Planning & Compliance
- Accounting Services
- Business Structuring
- Business Planning
- Management Advisory Services
- Forecasting & Reporting
- Identified & Increased Billing
- Client Communication
- Client Education
- Major Portfolio Management
- High-Profile, High-End Clients
- Risk Analysis
- Deadline Compliance
- Business Advice
- Business Counselling
- Corporate Restructuring
- Building Client Trust

QUALIFICATIONS

Masters in Taxation Law (MTax): 2007
UNIVERSITY OF MELBOURNE – Melbourne, Vic

Certified Practicing Accountant (CPA): 2005
CPA AUSTRALIA – Melbourne, Vic
High Excellence Award in Taxation / Distinction Average

MEMBERSHIPS & LICENSES

Fellow of Society of Tax Agents (STA)
Registered Tax Agent

CURRENT TECHNICAL SKILL SET

Solution 6, Viztopia, MYOB Accountants Office,
QuickBooks, Cashflow Manager, Wages Manager

PROFESSIONAL EXPERIENCE

HAVEN & Co – Melbourne, Vic

4/2007 to Present

\$2.5 - \$3 million turnover accounting firm providing accounting and tax advisory services to diverse national and international businesses, with combined turnover of \$45 million plus.

Business Services Manager

Preside over 5 major client portfolios, each leaders within their fields and posting an average turnover of between \$20-\$30 million, securing an overall annual company fee of \$550,000. Deliver expert compliance services and advice for businesses with high net worth and others within diverse structures of sole trader, partnerships, companies, trusts, super funds and others.

Areas of Accountability: Prepare and review of financial statements, BAS, FBT returns, cash flow and budget forecasts, management reports and others. Maintain monthly billings, communicating effectively with clients regarding amount and structure. Conduct monthly training sessions to staff and partners. Supervise, train and mentor staff to heightened level of value and productivity.

- **Saved between 25%-45%** in administration time through introduction of new systems such as Banklink, improved process flow for BAS, IAS and others.
- Provided expert advice to clients in areas such as STS, superannuation and tax consolidation to achieve varying **savings of up to 25% on tax payable**.
- Achieved **50% reduction in tax payable** for share recipients under employee share schemes.
- Identified incorrect BAS inclusion to **save client \$100,000 in GST**.
- **'Internal' tax expert** in areas including consolidation, international tax issues, CGT and small business, providing expertise across all portfolios and reducing external consultation fees.

Chartered accountancy of 20 years plus, providing corporate consulting and compliances services to local and international businesses across diverse industries. Annual turnover exceeds \$500,000.

Business Services Manager

Serviced 200 medium sized companies across manufacturing, retail, construction, investments, automobile, consultancy, catering, real estate and more, consistently building and managing exceptional relationships and delivering desirable outcomes within tight time constraints. Maintained individual client base of 250, ensuring personalised attention.

Areas of Accountability: Provided specialist tax advice in GST and CGT, advised on new business tax reform measures introduced by the Ralph Report and management and tax advice on business restructuring and planning including preparation of management reports. Prepared and reviewed financial statements. Trained accountants to ensure prompt delivery of work.

- Enabled **40% increase in fees** through providing exceptional level of service. Experienced near zero write off on clients and increased client base through existing client referrals.
- **Decreased administrative duties by up to 40%** and increased efficiency through introduction of electronic BAS loading and lodgement.
- **Expanded revenue base** through connecting with law firms to extend current company services to specialised tax consulting, tax issues on deceased estates, divorce CGT issues and others.
- **Reduced tax payable by self-managed super fund to 15% from 47%** by applying to ATO for private ruling and achieving complying fund status.
- **Identified \$20,000 savings** in tax payable for transport client selling business asset by researching client's participation in STS system.

Boutique CPA accountancy providing corporate consulting and compliance services to local medium-sized business community and private individuals. Annual turnover in excess of \$250,000.

Tax Accountant

Recruited to small boutique firm as only accountant able to handle compliance issues. During tenure, **personal portfolio grew from 50 to 150** business clients from broad ranging industries and **more than 200 personal clients**. Maintained exceptional level of efficiency and integrity.

Areas of Accountability: Prepared complex income tax returns, BAS, financial reports interim, annual P&L statements and balance sheets and addressed compliance issues. Provided tax compliance and consulting addressing tax issues and financial accounting reporting for companies, partnerships, joint ventures, trusts and others. Advised on accounting systems for business.

- **Increased reporting efficiency by 30%** within more than 30 companies and accounting services through implementation of computerised bookkeeping systems.
- **Saved \$15,000 in GST** and Capital Gains Tax for manufacturing business on the market for sale through conducting detailed research to identify similar financial outcomes.
- Researched and introduced new accounting procedures for super fund, resulting in **15% faster tracking** of member's funds.
- Increased client satisfaction resulting in **20% boost in new clients** through existing client referrals.

