

SEEK OUT THOSE WITH THE ANSWERS HERE.



OUR MULTIDISCIPLINED APPROACH IS THE KEY.

WE PROVIDE SOLUTIONS
TO UNCERTAINTIES OUR
CLIENTS FACE EVERY DAY.





EACH CLIENT BENEFITS FROM OUR COMBINED SKILLS.

WE ARE UNIQUE IN BOTH
OUR APPROACH, AND THE
OUTCOMES WE ACHIEVE.

CONTENT MANIFEST.

CHAPTER Nº1.

NO LONGER TRUE.

Reliance on traditional singular skills is no longer a sure path to prosperity.

CHAPTER Nº2.

NEW FUNDAMENTAL.

A dramatic shift in business need and approach by partners is under way.

CHAPTER Nº3.

TRANSLATING WISHES.

Reaching life's ambitions takes timely skills and thoughtful ongoing support.

CHAPTER Nº4.

A CONTRARY VIEW.

True wealth begins with discovery and understanding not investment fashion.

CHAPTER №1.

THE TRADITIONAL ADAGES
WE RELIED ON ARE NO
LONGER HOLDING TRUE.

Not so many years past, life and business were a lot easier.

It was easier for firms to confidently navigate to sustained prosperity, and comply with familiar rules and regulations, and it was easier for individuals to work each day knowing their earnings were sufficient, and that they were progressively building wealth.

The everyday adage, that had served generations before, held true ~ hard work ensured deserved prosperity.

Also in the past, firms and individuals set their own goals and ambitions, and sought out the single skills they did not have to compliment their needs.

These skills were called upon as required, and only paid for when used.

Audits were commissioned and completed, and company structures were requested and put in place. Annual reporting, individual taxation returns, superannuation plans, all asked for ~ and duly completed.

This taxi-meter approach worked well, and was all that the circumstances in commerce and employment called for.

But the levee of the past has been forever breached ~ these times are times of intrusion and interference.

The huge number of new laws being introduced that impact on the financial operation of companies, and restrictions to earnings has accelerated, and shows no sign of abating.

So too with the regulations meddling with the earnings and contributions of individuals.

Yet, successful companies and individuals, continue to thrive. And it is with these real world examples of success that all should look to for a methodology to cope with rising compliance, and overcome the new barriers to prosperity.

Without exception they no longer adopt the method of privately creating their goals, and then commissioning singular practitioners for one-off tasks. Rather, they have sought out those specialist firms with a willingness to understand, listen, and assist in determining achievable goals, and with a multidisciplined approach where the skills and expertise of their team act as a layer between the regulations and the action to be taken.

With every business, and every individual so tied to the intricacies of financial regulations, this compliance environment places a premium on the understanding of how it affects all facets of your firm, or individual circumstance.

It is this layer of commercial understanding that we add to each client that ensures their prosperity is achievable.

It is the methodology of constant fine-tuning of plans and actions that ensure their prosperity is sustained.

And it is the approach of a multidisciplined team optimising every facet of a client's circumstance that ensures their prosperity is maximised.

Before you is a choice, within the following chapters we explain how this uncommon understanding of the forces that drive business, opportunities available to individuals, and benefits that can be unlocked for wealth creation, differentiate our firm.

It is our hope here that you provide us with the opportunity to put our words into action this day ~ so that we may prove ourselves.

CHAPTER Nº2.

AN ADEPT PARTNERSHIP IS
THE NEW FUNDAMENTAL IN
SUSTAINED PERFORMANCE.

Astute business leaders ~ in companies both large and small ~ continually review their profit and loss statements for ways to reduce line item costs.

But they also take a broader view ~ recognising all potential profit increasing opportunities, and seeking to use their balance sheets far more effectively.

Today, the emphasis is on using company financial data to create a far more profitable company ~ and sustain it. Such an emphasis can lead to strategic divestment or acquisition decisions, both requiring multidisciplined skills including due diligence execution, accounting analysis, and tax structuring.

Business leaders who realise that relentless cost cutting is not the only path to company prosperity seek out partners who can add valuable insight to their firm's day-to-day operations. From this comes strategies to rise above the status quo, do business far more efficiently, and to seize new market opportunities to drive profitable growth in the long term.

Here, those accountancy firms that just do yearly tax and audits have no role ~ at all.

These chosen partners have expertise in all aspects of the fundamentals of business, and their skills cross all disciplines. It is a unique characteristic that they collaborate more broadly and frequently, and delivering precise information for business decisions.

We are such a partner.

This shift in need ~ and in approach ~ is fundamentally different to the usual perception of an accountant. Here we are able to support all the divisional directors with both insightful informational analysis and accurate data as they rethink ~ and rejig ~ the way they do business.

We work as true partners, with the same goals, also singularly driven to find new ways of adding value to their operations, implementing the company structures to support their initiatives, and enhancing purchase and divestment tasks.

We work to bridge the gap between the desired business outcomes sought by a focussed client and the usual provision of just a delivered static report or service ~ ticked off as done and delivered.

Perhaps it is the current rout of the world economy that has given highlighted emphasis to this partnership approach.

Never before have the weaknesses of uniformed business decisions, the inaccuracy of financial information, and failings of advice been so dramatically revealed.

It is clear that successful business leaders today are seeing this transitional age as an opportunity to make much needed improvements in every aspect of their businesses.

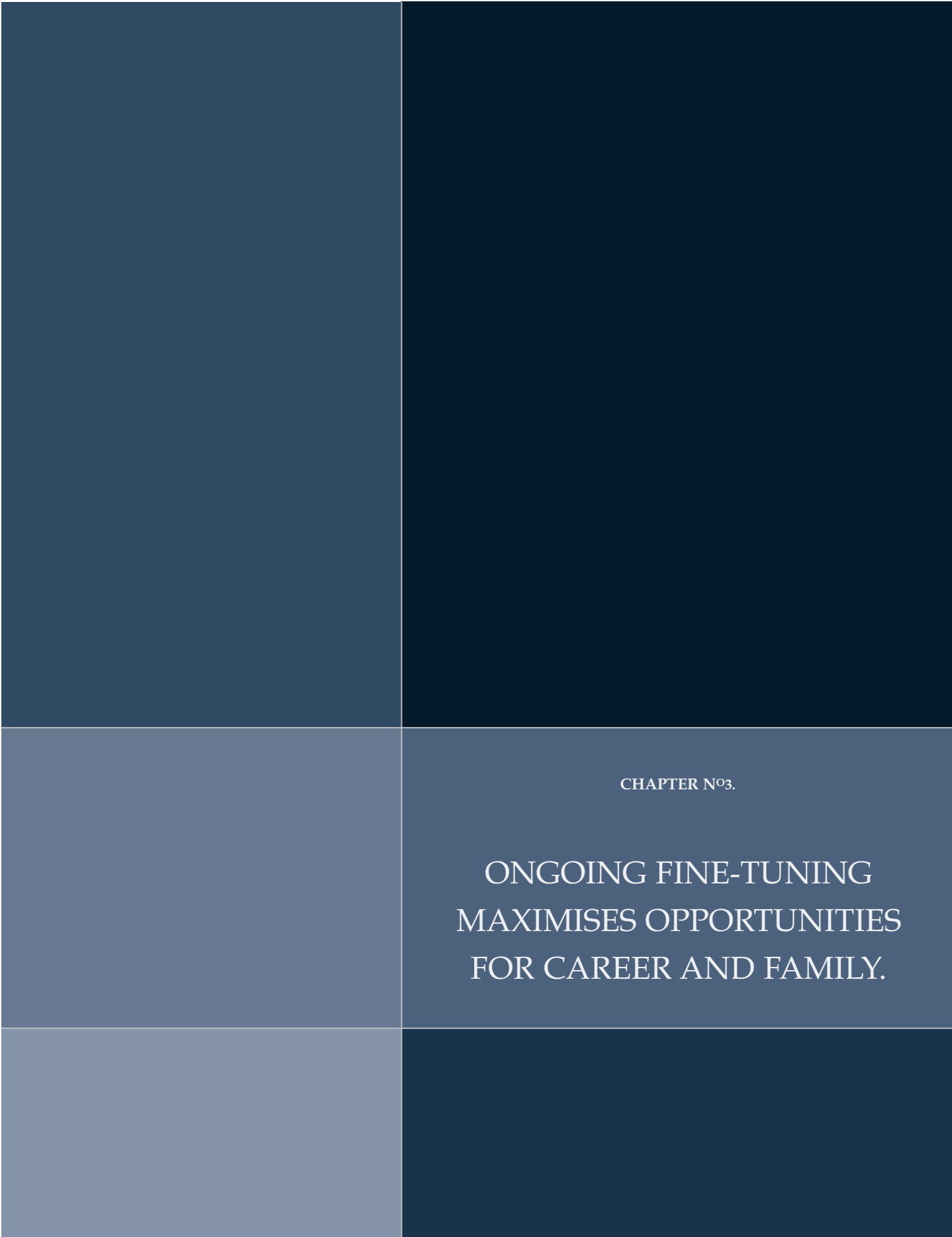
They see that with timely advice they will achieve sustained top-line growth, boost business data understanding and hence higher quality of decisions across the enterprise, ensure ongoing regulatory compliance, be enabled to quickly act on market opportunities to acquire and divest with high level tax structures, and have greater flexibility in retaining and growing earnings.

You have a choice.

You can continue to sign for one-off labours, or you can partner with a firm willing to share your corporate aspirations, plan how to attain them and be involved in business outcomes.

STAND-ALONE TASKS.

- | | |
|------------------|---------------------------------|
| TASK Nº1. | Business data and intelligence. |
| TASK Nº2. | Taxation and structuring. |
| TASK Nº3. | Business strategy advisory. |
| TASK Nº4. | Purchase and divestments. |
| TASK Nº5. | Annual company reporting. |
| TASK Nº6. | Auditing and assessments. |
| TASK Nº7. | Reports and documentation. |
| TASK Nº8. | Compliance undertakings. |
| TASK Nº9. | Acquisition due diligence. |



CHAPTER Nº3.

ONGOING FINE-TUNING
MAXIMISES OPPORTUNITIES
FOR CAREER AND FAMILY.

A full year of life's opportunities and challenges ~ for individuals employed and self-employed ~ can not be continually met with a single year's end tax form.

All of us all work in a new world order of far reaching change and freedom, one where each of us has unprecedented opportunity to craft our own future ~ and that of our family.

Many decide to seek an advantage in this time.

Such individuals seek skilled help to translate their wishes into plans, monitor execution, and provide financial insight to better optimise and reinvest their income.

From these focussed ongoing tasks will come financial results that are above the norm.

Such skilled help can only come from a firm that understands the positive outcomes that can be wrought from change.

Such events could be a new job contract, a raise, marriage, starting a family, buying a house, changes in the law, receiving an inheritance, also exceeding director or partner income allocations, and selling the family business.

The right advice can mean life's ambitions are reached far sooner than for those who make uninformed choices.

We are such a source of timely advice ~ and ongoing support.

This event-driven approach ~ and the willingness to become closely involved ~ is fundamentally different to the usually static role of an accountant.

We work with individuals as an enablement partner ~ continually structuring income to be at its most efficient, optimising investments for higher rewards, and harnessing financial structures to best retain earnings.

Such tasks are becoming more difficult to accomplish as new laws are being released, and old ones constantly revised ~ adding previously unimagined complexity.

For the wealthy, highly skilled practitioners are now a day-to-day necessity to master the challenges of creating and conserving wealth. For the salaried, their ability to hold onto what they earn, and also steadily grow wealth also now needs a retinue of experts.

So then our end goal with an individual who relies on us, is certainly not a tax form duly signed off and filed, our end goal is never reached ~ but constantly updated and strived for.

In an age where services applied are measured by the sixth minute, we are indeed uncommon in our willingness to think and act long term for our clients.

You have a choice.

You can continue to be pushed passively along by the momentum of life and employment ~ as most do ~ or you can decide to seek the help of a firm that will share your unique personal goals, craft current circumstances into a solid base for prosperity, forge events into opportunities, and continually fine-tune your financial performance.

Ours is not an all-or-nothing methodology. So to begin to earn your trust you need only ask us to work on a single pressing task.

STAND-ALONE TASKS.

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|------------------|-------------------------------|
| TASK Nº1. | Income optimisation advisory. |
| TASK Nº2. | Taxation and structuring. |
| TASK Nº3. | Income sharing strategies. |
| TASK Nº4. | Family trust advisory. |
| TASK Nº5. | Annual taxation reporting. |
| TASK Nº6. | Optimised finance advisory. |
| TASK Nº7. | Superannuation strategies. |
| TASK Nº8. | Employment contract advisory. |
| TASK Nº9. | Investment income strategies. |

CHAPTER №4.

OUTSTANDING RESULTS
BEGIN WITH DISCOVERY
AND UNDERSTANDING.

It would seem that the currently held view of financial planners is that they dwell on the current fashion in investing, and many clients think they can do better themselves. We agree.

The downheaval in share prices has shown ~ once again ~ that any investor who blindly follows a fashion will ultimately be betrayed by it. It is just a matter of time.

And intelligent business people who adeptly guide their disparate teams through the maze of commerce each day, feel they know their own current situation far better than a financial planner who didn't enquire ~ rightly so.

If you too hold these views then we will be a good fit indeed.

We do not take a singular discipline view of financial planning. Our view is quite contrary. We believe that only by discovering a client's current situation, understanding their life goals, and then applying the talents of experts in different accounting fields, can a robust wealth plan be devised that can add value now ~ and in the future.

We also do not take the populist view that a plan can be simply handed over and let run. Again our view is the antithesis of the norm. We believe that in step with life's changes and opportunities, a wealth management plan must be restructured to take advantage and optimise the benefits.

Some very real examples of these changes could be the altering of income proportions with a partner as tax laws change, using new loans to offset a sudden increase in income before tax time, or moving investment income to a family trust. All such optimising tasks can not possibly be foreseen in a static plan, and can not be rightly accomplished with the skills of a single disciplined financial planner.

In this age of distressing bankruptcies of once global corporate titans, and advancing employment uncertainties is it only right to question one's own financial wealth plans.

Seeking the help of a specialist has the potential to deliver extraordinary value beyond simple iterations in percentage point returns. But with great emphasis we implore you to avoid the mistakes that the current crisis has uncovered.

The overseers of the financial planning industry have quickly introduced new laws, new guidelines, and new standards of conduct. We welcome all, but none goes to the heart of the matter we see as so important. These new laws and regulations can not change the common misdirection and chicanery that planners can do it all.

What is needed is a partner that is an in-house team of proven experts in all matters that impact on a client's wealth ~ an uncommon species.

We are such a team of experts.

Rather than limiting your wealth to the talents of a single resource, a single set of approved investments, a single intellectual view, and a single mode of investing experience, we offer a skill arbitrage of multidisciplined approach that leverages the most optimal outcomes in each facet of an individual's financial circumstance.

You have a choice.

You can continue to be limited by the skills of just one person, either yourself or a financial planner ~ as is routine ~ or you can benefit from a collaborative value adding focus on all that makes you unique in life and business.

STAND-ALONE TASKS.

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|------------------|---------------------------------|
| TASK Nº1. | Risk reduction strategies. |
| TASK Nº2. | Asset growth planning. |
| TASK Nº3. | Superannuation structuring. |
| TASK Nº4. | Contribution strategies. |
| TASK Nº5. | Retirement plan advisory. |
| TASK Nº6. | Investment income strategies. |
| TASK Nº7. | Discretionary trust advisory. |
| TASK Nº8. | Estate plan setup and advisory. |
| TASK Nº9. | Rollover optimisation advisory. |

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