



HOODSWEENEY

**PROFESSIONAL SERVICES
THAT GET YOU TO WHERE
YOU WANT TO GO**

HOODSWEENEY

join the journey



join the journey

HOODSWEENEY

The journey to now.

Our journey started in 1976 as a humble accounting firm, P. J. Hood & Co.

It's hard to believe it with our success today, but at that stage, we had just one, solitary client.

In our first decade came our first merger, bringing Graham Sweeney, the name we have today and 200 clients.

Evolution continued at a breathtaking pace, year after year, and into a new millennium.

We added new services: financial planning (in 2001), technology (in 2004) and finance (in 2005), along with new Directors and other acquisitions.

In fact, in 2004, BRW ranked us second in its top 10 fastest-growing accounting firms, nationally.

By 2009, that growth had secured us 35th spot overall on BRW's Top 100 accounting firms.

In 2012, we gained a partnership with ASX-listed CountPlus, joining its network with 20 other practices across Australia for all the advantages that has brought us without compromising our independence or self-determination.

And, in 2013, we completed the merger with Shearer + Ellis: a company founded in 1985 by Michael Shearer and Ian Ellis with an almost perfect alignment of talent, heritage, clients and values.

But it doesn't stop there.

Together, we can realise the goals we share on that wonderful journey we call life.

Hood Sweeney. Join the journey.

The growth our company has enjoyed is only a reflection of the success we've helped our clients build for themselves, as their trusted life-long partners and advisers.

The way we see it, life is one journey shared by fellow travellers.

That's why we always seek to understand you and your business, empower your strengths, better your weaknesses, nurture your opportunities and signal your threats.

The journey never ends; it is a continuum of potential.

So, small start-ups might join the journey initially needing only basic professional services along with the advice that will help them grow.

Individuals will join the journey for help with their taxation, finances and financial planning.

While small-to medium-sized enterprises and not-for-profits will join the journey to gain a trusted partner and adviser who will feel like a part of their own organisation, utilising every area of our advice.

YOU WEREN'T BORN WITH AN INSTRUCTIONAL MANUAL.

Life is a journey with a thousand crossroads and no map.

You weren't born with an instruction manual.

Yet, every crucial decision you take along this roller coaster ride has the power to change the course of your life.

It's not just the major path you choose in your profession, principles, passions and pastimes.

It's people, too.

Fortunately, with the right relationships, you don't have to walk that journey alone. Nor make your most courageous decisions without the strength, foresight and knowledge of a trusted adviser beside you.

And there are four key reasons why Hood Sweeney should be your choice.

1) The value of our service starts with the values we follow.

There are five values that define us, motivate and guide us, jointly and individually. Every single day.

INSPIRATIONAL	We have the courage to lead and influence change.
EXCEPTIONAL	We are uncompromising in our delivery of superior service.
CONNECTED	We work as one to achieve success and celebrate it together.
RESPECTFUL	We recognise and embrace different opinions, and build an environment of trust and integrity.
DYNAMIC	We take ownership, challenge and deliver the extra effort.

2) We understand you.

This takes time. But we are here for the long haul (as we've shown over the past four decades).

The first step is to sit down and listen to you and discover your business goals and your personal needs. Only when we know where you're headed can we work with you to get there.

3) We'll take the initiative.

Our job is to build your peace of mind as well as your wealth. So, consider us your wingmen.

If we see a business problem, a risk that needs managing or an opportunity on the horizon, we'll make sure you know about it.

4) Genuine relationships.

Hood Sweeney's client service is all about understanding and responding to your unique needs.

Our aim is not just to meet those needs, but anticipate them. And that means continuous communication.

It means a collaborative working relationship that's managed to ensure it's robust and relevant.

It's about trust and a genuine feeling of being on the same side, working to the same goals.



Everything you need along the way.

Today, we have over 100 staff in three offices serving over 3,000 clients throughout South Australia, including small-to medium-sized private businesses, agribusiness enterprises, health providers, not-for-profits and individuals, with services that encompass:

- Accounting & Business Advisory
- Consulting and Performance Coaching
- Financial Planning
- Technology Services
- Finance

By getting to know our clients as people, we understand their needs, their hopes, their fears and their dreams.

And with each year that passes, we find new ways to make those dreams a reality by adding new resources, intelligence and staying on the crest of our industry's innovation.

So: no matter where you join us on your journey, it's the first step towards peace of mind and prosperity.

Accounting and business advice for your journey.

Hood Sweeney's Accounting & Business Advisory team helps individuals, family businesses and small-to medium-sized enterprises with an exhaustive range of services, including:

- financial and management accounting
- taxation advice and business structuring
- taxation compliance and reporting
- budgeting, cash-flow forecasting and financial modelling
- merger, acquisition and divestment support
- succession planning
- strategic business planning
- business coaching and performance improvement
- board development and corporate governance.

It's not just about making sure the numbers add up. We add so much more than that.

From the basics of taxation and accounting to consultation on key management decisions and generational planning, we share every step of your journey, in good times and bad.

Hood Sweeney Accounting & Business Advisory has the people, the experience and the business nous to give you the counsel you need, whenever you need it.

- ✓ We hold our own Australian Financial Services Licence (number 485569).
- ✓ Hood Sweeney has professional staff who are members of the Institute of Chartered Accountants and CPA Australia.
- ✓ Our Directors are members of the Australian Institute of Company Directors.

Hood Sweeney Accounting & Business Advisory
AFSL No. 485569
ABN 30 007 696 595



Finding the right finance for your journey.

Hood Sweeney's Finance team is dedicated to extracting the maximum benefit from your financing facilities.

Our services include:

- personal and commercial lending
- bank financing reviews and negotiation with lenders.

When you find the right finance, it can suddenly make your journey to prosperity a lot faster and smoother.

Through our proven skills and knowledge in commercial, equipment and personal finance, we know what products are available, how to pick the one that suits your needs and how to gain the best possible deal.

On top of that, acquiring a new loan, refinancing your debt or renegotiating with lenders can produce spectacular results for your cash flow and bottom line, either as an organisation or an individual.

And if you own a business, a bank financing review can provide either a significant financial benefit or the peace of mind that you are receiving market-competitive rates and services from your current banker.

Our team's experience in finance, combined with the accounting and taxation skills within Hood Sweeney, make us a formidable champion for your cause when dealing with financiers.

- ✓ Hood Sweeney is not tied to any financial institution, allowing us to operate always with your best interests in mind.
- ✓ Hood Sweeney Finance holds an Australian Credit Licence (number 391396).
- ✓ For our bank financing review service, our fee is based on a percentage of the saving we gain for you, so: no saving, no fee.
- ✓ Our finance specialists have the experience and relationships formed from over 40 years in the finance and banking industry.

Hood Sweeney Finance Pty Ltd
 Australian Credit Licence
 No. 391396
 ABN 12 113 454 014



Financial planning for your journey.

Hood Sweeney Securities is our Financial Planning arm, specialising in optimising the total financial position of professionals and self-funded retirees, including:

- creating a financial strategy for your life's journey
- advising you on how to accumulate wealth
- managing your investment portfolio
- advising trustees of self-managed superannuation funds
- planning for retirement
- protecting you and your family.

The road to a prosperous future starts with establishing clear goals and optimising your financial position to build assets that will generate income and lead to financial independence.

Your ability to protect your family financially and secure your income to continue to create wealth is also of paramount importance.

If you're self-driven, motivated and financially astute, it can also be very rewarding – in every sense – to take control of your destiny (and your largest financial asset) by managing your own superannuation.

Hood Sweeney Securities has a range of options to secure all your assets, your future, and that of your business.

- ✓ We already manage over half a billion dollars of investments for clients.
- ✓ We hold our own Australian Financial Services Licence (number 220897).
- ✓ We are committed to the highest ethical standards as a Professional Practice of the Financial Planning Association of Australia.
- ✓ Our fees are completely transparent and benchmarked against service standards.

Hood Sweeney Securities Pty Ltd
 AFSL No. 220897
 ABN 40 081 455 165

**PROFESSIONAL
 PRACTICE**



WE'LL WORK WITH YOU TO DEVELOP A CUSTOMISED SOLUTION.

Information & communications technology to help you along your journey.

The Technology Services team at Hood Sweeney specialises in reliable, cost-effective and scalable solutions for information and communications, including:

- strategic planning and consulting on information technology
- management of information technology projects
- analysing and selecting systems
- planning for disaster recovery and business continuity
- total solutions for mobile devices and communications
- designing technology architecture
- supporting your network and infrastructure
- help desk and user support
- procuring hardware and software
- outsourced CIO role.

For over 15 years, we've been helping clients across South Australia from private companies, publicly listed companies, government entities, not-for-profits, professional services and small-to medium-sized enterprises with both the strategic plan and the hands-on operational support to put them on the right track with technology.

We'll work with you to develop a customised solution that improves your accessibility, connectivity and communications, driving business and adding value to your bottom line.

We'll also ensure your infrastructure and applications are protected, with preventative measures to reduce threats to your business, along with contingencies for when the inevitable emergency arises so your business can continue uninterrupted.

- ✓ Hood Sweeney partners with a range of leading technology providers such as IBM, Lenovo, Hewlett Packard, Cisco, ShoreTel, Citrix and Microsoft to ensure you get competitive rates.
- ✓ Our staff are accredited in the systems they support and receive ongoing professional development to ensure they are up to date with all the latest technologies.
- ✓ We are 'product agnostic', so we develop the most appropriate solution for your business and your budget, and always act in your best interests.



HOODSWEENEY

Now, this is where your journey starts.

To join the journey with Hood Sweeney, or to find out more about what we can do for you, please contact us.

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