

LEE · GREEN

STRATEGIC ACCOUNTANTS



WE'LL GET YOU WHE



RE YOU WANT TO GO

OUR PROCESS

“Everyone who got where he (she) is, has had to begin where he (she) was.”

– Robert Louis Stevenson

Whether you're an individual or a business, when you become a Lee Green client, we'll work with you to determine where you are and where you want to go.

Then, we'll help map your route, accompany you on the trip, review your progress and plan the next stage.

1

Assessment and Goal Setting



2

Devise Strategy



LISTENING AND LEADERSHIP

3

Plan
Outcomes



4

Monitor
and Analyse
Results



5

Success!



LISTENING AND LEADERSHIP

SERVICES

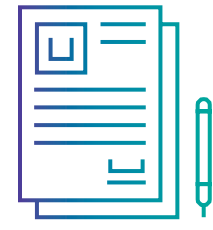
Lee Green is a professional services firm skilled in the analysis and communication of financial information. Our role is to lead the process of devising, planning and managing the financial means by which our clients achieve business success.



STRATEGIC THINKING

Not surprisingly, most accounting firms offer a range of accounting services.

What makes Lee Green different is our commitment to ensuring every one of the services we provide contributes to the realisation of your strategic business or personal plan.



ACCOUNTING SERVICES

Preparation and analysis of:

- Project Costing Models
- Return on Investment Models
- Employee Utilisation Models

Other Accounting Services include:

- Accounting Software selection, implementation and training
- Training
- Bookkeeping
- Payroll
- Reconciliations
- Corporate Secretarial



AUDIT & EXAMINATIONS

- Independent financial statement audits
- SMSF Audits
- Trust Account Audits for real estate, accountants and conveyancers
- Travel Industry audits
- Outgoings audits for property managers
- ORIC Examinations – Aboriginal Corporations CATSI Act 2006 Compliance
- Operational control systems
- Business continuity
- Internal Control assessments
- Process improvement and examination
- Legislative compliance reviews
- Reporting effectiveness and accuracy



BUSINESS CONSULTING

- Business Mentoring
- Meeting Facilitation
- Development of Pricing/Costing Models
- Project Analysis/Reporting
- Development of Management Reporting Systems
- External Chief-Financial-Officer
- Due Diligence Engagements
- New Business Assessments
- Assistance with Finance Applications



TAX & COMPLIANCE

- Tax Planning and Structuring
- International and cross border transactions
- Income Tax Returns and BAS
- Registration for GST and PAYG
- Private Ruling Requests

Advice on:

- Asset protection
- Capital Gains Tax
- Dispute resolution
- Estate planning
- Income Tax
- Retirement
- Salary packaging and Fringe Benefits
- Stamp Duty
- Superannuation
- Workcover



SUPERANNUATION

- Self Managed Super Fund (SMSF) administration to ensure SIS compliance
- Audits
- Preparation of SMSF tax returns, financial statements and members statements
- Provision of timely and accurate reports to your investment adviser
- Superannuation administration and compliance for small business

TOM GREEN



Founding Director - 1989 · Director - Business Advisory
Bachelor of Arts (Accountancy) · Certified Practising
Accountant · Registered Tax Agent · Chartered Tax Adviser

Ask Tom what the highlights of his 40-plus years accounting career have been and the answer revolves around helping organisations reach their potential - ensuring the sustainability of not-for profits, developing and guiding small business growth strategies and developing management reporting systems to guide the success of professional services firms.

With acknowledged expertise in strategic business planning applied in both advisory board roles and as a consultant, Tom has specialist industry knowledge of Cooperative Research Centres, real estate, and small to medium enterprises more generally.

SECTORS

SMALL TO MEDIUM ENTERPRISE

PROFESSIONAL SERVICES

REAL ESTATE

COOPERATIVE RESEARCH CENTRES



My professional passion lies in sharing the journey of my clients' business life cycles. Often, the journey may take us to a destination they didn't think possible or that might not have been reached if they were travelling alone.



DAVID CHARLESWORTH

Director - Assurance Services · Joined Lee Green in 2002 · Bachelor of Business (Accountancy) · Chartered Accountant · Registered Company Auditor · Self Managed Super Fund Auditor



There are times on life's journey when it pays to know where you are and where the risks lie. That's my role as a strategic accountant and as an auditor - helping organisations understand their current financial position, assisting reporting and governance, and providing the intelligence required to inform sound leadership decisions and mitigate risks.

It's David's job to know where the money is - and it's a job that's taken him to most States and Territories and places as remote as the Tiwi Islands and South Goulburn Islands in the Arafura Sea. (Who says auditors lead boring lives?) His expertise includes auditing Statutory Accounts for the private sector and not-for-profits, Outgoings, Trust

Accounts and Self Managed Super Funds. David has particular expertise in the Aged Care sector.

He also applies his professional expertise on a pro bono basis as Auditor for the Cancer Care Centre and Cystic Fibrosis SA. He's a keen follower of Australian Rules footy through the Cove Football Club - and loves a spot of fishing!

SECTORS

AGED CARE

INDIGENOUS BUSINESS

SELF-MANAGED SUPER FUNDS

NOT-FOR-PROFITS

MICHAEL SWEENEY

Director - Taxation · Joined Lee Green in 2005 · Bachelor of Accountancy · Masters of Taxation · Certified Practising Accountant · Chartered Accountant · Registered Tax Agent · Chartered Tax Adviser



PRINCIPAL



I believe that as a strategic accountant, my role is not just minimising tax. Rather, its about understanding your circumstances and objectives and developing and implementing practical strategies to get you where you want to go - both personally and professionally.

"In this world nothing can be said to be certain, except death and taxes." So wrote Benjamin Franklin in 1817. Mike Sweeney has made a career out of the latter since 1992, earning a strong reputation for his work in biotechnology, property, wholesale, not-for-profit organisations and start-up businesses around Australia and in Singapore.

His particular professional interest? Developing strategies which build business growth. One of his most rewarding assignments - developing a business

amalgamation strategy for two large horticulture clients.

Outside work, Mike is passionate about his family, movies and basketball. His community commitments have also grown from his passions, having previously served as Executive Chair of Basketball Adelaide as well as Board Member and Treasurer of Blindsports SA. Mike currently sits on the board of Russell Bedford International and is Chair of their Social Impact Committee.

SECTORS

BIOTECHNOLOGY

STRATEGIC AND BUSINESS PLANNING

PROPERTY

START-UPS

HORTICULTURE



PRINCIPAL



I always strive to help my clients see past the numbers, providing a sounding board for business and personal ideas and optimising financial outcomes to achieve future goals. Being a part of this journey with our clients is what really makes my role enjoyable.

BEN SPIERS

Joined Lee Green in 2018 · Bachelor of Commerce (Accounting) · Chartered Accountant · Registered Tax Agent · Approved SMSF Auditor

Being an accountant is so much more than sitting behind a desk; it's visiting clients, developing relationships, understanding their businesses, all while meeting compliance obligations and keeping an eye on the bigger picture. Ben is often on-hand to assist his colleagues and clients with technical issues or just to discuss any queries.

Working at Lee Green has been pivotal in helping him reassess how he advises clients, facilitating more meaningful discussions to help them run their businesses more effectively.

Relay for Life is on Ben's annual calendar, and he volunteers for Meals on Wheels frequently. On the weekends, Ben values his time with his wife and three children, exploring South Australia, cooking and sports.

SECTORS

COOPERATIVE RESEARCH CENTRES

SMALL TO MEDIUM ENTERPRISE

FAMILY BUSINESS



PRINCIPAL



Being a valued advisor is more than responding to clients' needs - it's knowing their business as well as they do so you can provide the most relevant and up to date advice and truly partner with them on their journey to success.

TSEPAK TSETSANG

Joined Lee Green in 2023 · Bachelor of Business (Accountancy) · Chartered Accountant · Registered Tax Agent

Tsepak is a keen problem-solver and spends each day dedicated to not just supporting his clients, but also training and guiding the staff around him. Always focused on the next generation of accountants, Tsepak makes time each day to capitalise on any learning opportunities to share with the team.

With a passion for technological improvement, Tsepak has an eye for how to take advantage of the latest software developments to improve and streamline client and internal systems.

Contributing significant industry experience and knowledge, Tsepak specialises in small businesses, professional services, self-managed superannuation funds, and the real estate sector.

Beyond solving problems for his clients, Tsepak also loves being able to simplify or manage his client's accounting needs so they can focus on achieving their financial goals, growing their business, or simply enjoy more free time. Outside of the office, Tsepak loves spending time with his family and especially loves watching his two sons grow.

SECTORS

SELF-MANAGED SUPER FUNDS

REAL ESTATE

SMALL BUSINESS

PROFESSIONAL SERVICES

**ASSOCIATE DIRECTOR**

I love every aspect of coming to work each day at Lee Green. Whether it's working with clients or with our junior staff to help them along their professional learning journey, it's being able to work closely with others and give them a hand that makes my day.

SAMANTHA HUGHES

Bachelor of Commerce (Accounting) · Certified Practising Accountant

Working with colleagues that you get along with makes life more enjoyable for Samantha and leads to a more engaging environment and better client outcomes. Having a broad client base and plenty of variety also helps.

Highly personable, Samantha mentors junior staff and enjoys meeting clients to discuss their requirements. She spends much of her time processing clients' information to enable her to prepare financial statements, management reports and income tax returns. She also performs

government acquittal reporting, processes self-managed super funds and prepares reports for government funding bodies.

Samantha spends time away from work chasing her toddler. For something completely different, she supports the not-for-profit Wombat Awareness Organisation with accounting, advice and on building projects. Samantha's family is also kept busy looking after their array of pets that include chickens, fish, 2 dogs and a Stimson's python.

SECTORS

HEALTH
INDIGENOUS BUSINESS
FAMILY BUSINESS
NOT-FOR-PROFITS
AGED CARE
SELF-MANAGED SUPER FUNDS



APARNA HETTIGE

Bachelor of Science in Business Administration · Master of Professional Accounting · Certified Practising Accountant

With a Masters in Professional Accounting and CPA qualifications, Aparna brings a wealth of knowledge to her position as an Accountant at Lee Green. Her day to day involves preparing individual, trust, partnership and small company tax returns and business activity statements, in addition to providing accounting, bookkeeping and payroll support to clients.

Aparna specialises in working with Aboriginal Corporations, making her a perfect fit within our strong Indigenous Business service team.

The opportunity to apply her theoretical knowledge to a broad range of different clients each day is what Aparna enjoys most about her role.

With an attitude focused on continual learning, Aparna fits seamlessly within our team, whom she describes as friendly, caring and always happy to help. Within her role she enjoys the additional flexibility and work life balance which is especially important to her as a new mum.

SECTORS

INDIGENOUS BUSINESS



Working at Lee Green is an investment in myself. As an individual who has great theoretical knowledge, my role here allows me to expand and apply my skills to make a positive impact on business and individual clients.

Lee Green shapes me as a knowledgeable, confident and accountable accountant.

CHING LEONG

Accounting Certificate



BOOKKEEPER & ACCOUNTANT



Working at Lee Green allows me to meet and work with people from diverse backgrounds. When it comes down to it, numbers and accounting are the same in almost any language, and if I can bring my skills to help others and make their lives easier, I feel satisfied.

Working with people from different backgrounds is one aspect of Ching's working life which she thoroughly enjoys, as it reflects the diverse nature of the work Lee Green does for clients in urban, regional and remote Australia as well as key Asian markets.

Ching also specialises in summarising and consolidating client accounting records and preparing financial statements and tax returns for businesses of all sizes.

She loves getting out and about, whether it's yoga, taking part in the City to Bay fun Run, walking or gardening. Ching also lends a hand when she can with Cancer Council fundraising.

SECTORS

RESTAURANTS

MARKET GARDENERS

CHRISTOPHER LEGGETT

Advanced Diploma of Accounting · Bachelor of Commerce ·
Certified Practising Accountant



AUDIT MANAGER



The strength of the team is each member. The strength of each member is the team.

By building great relationships with our clients, we can provide them with the exceptional experience that Lee Green values itself upon.

With an Advanced Diploma of Accounting, a Bachelor of Commerce and CPA under his belt, along with his 13 years of audit experience, Chris has packed in a great deal of knowledge and experience on his journey to us at Lee Green.

Chris manages all aspects of our audit division at Lee Green and specialises in a range of sectors including not-for-profits, aboriginal corporations, aged care entities, unlisted corporations and trust accounts. Chris is no stranger to managing many different tasks with his team to get the job done.

Chris is also our go to person for financial statement preparations for all financial reporting frameworks, where he ensures that the financial statements being issued are compliant in all respects.

Chris prides himself on delivering an excellent service to our Lee Green clients and loves the satisfaction that comes when clients are happy with the job that has been done. He loves working in a great team and cultural environment and finds the ability to share his expertise and experience with other team members and clients especially rewarding.

SECTORS

ABORIGINAL CORPORATIONS

NOT-FOR-PROFITS

AGED CARE ENTITIES

TRUST ACCOUNTS

UNLISTED CORPORATIONS



ACCOUNTANT



I love starting my day with a good to-do list. Planning and prioritising each day's tasks ensures nothing is left to chance and my clients receive the best possible service.

DAN DANG

Bachelor of Business (International Hotel Management)
Master of Accounting

Dan joins Lee Green as an Accountant, though their previous experience working in the hospitality industry as well as in the logistics department of a horticulture company provides a unique perspective to their role. With a diverse working background comes a great deal of practical experience that Dan can apply to clients in their accounting career.

Motivated by to-do lists and powered by a cup of black coffee each morning, Dan strives towards contributing to their clients' growth, especially in the areas of strategic planning and risk management.

With a love for continual learning, Dan enjoys the potential to grow and learn from the experiences ahead and colleagues at Lee Green. Outside of work you can find Dan spending time with their beloved pets, or reading and playing music.

SECTORS

HOSPITALITY

HORTICULTURE



ACCOUNTANT



Every day I feel like I am learning something new. Every client is different, and I love building relationships with my regular clients.

DANA FENG

Master of Accounting & Finance

Dana always gives 100% at work, enthusiastically helping each and every one of her clients at Lee Green.

The mum of two youngsters has been an accountant at Lee Green since 2014 and appreciates the support the firm has provided while raising her young family.

Dana considers every day at Lee Green an opportunity to learn something new, and she loves building client relationships. Her role centres around preparing financial statements and tax returns, assisting clients with their regular tax compliance obligations and responding to bookkeeping and payroll queries.

SECTORS

HORTICULTURE**PROPERTY****INBOUND INVESTMENT**

**ACCOUNTANT**

Sometimes it helps to ask for assistance when you need it, in both business and life in general, and I'd like to believe we all can help where we can. A lot of people are afraid to ask, but when we can stand up and say we're working to make lives easier, it makes a huge difference.

DESLEY EDWARDS

Diploma of Business Studies

Desley is always happy to help, whether it's resolving client queries or assisting her colleagues.

Specialising in tax, Desley spends much of her time preparing returns and financial statements for Lee Green clients. She rises to the challenge of different tasks and enjoys the variety of work in the field.

Desley has participated in many of Lee Green's corporate volunteer opportunities, sharing in the community spirit her colleagues inspire. She loves to read and shop, so it might be a good thing that the Lee Green's Adelaide offices are on the city fringe...

SECTORS

FRINGE BENEFITS TAX

PERSONAL TAX RETURNS

**SENIOR SMSF AUDITOR**

I love my job because I ensure that we are doing the right things for our clients so that their super fund complies with legislations and clients' retirement benefits are safeguarded.

ELLY WONG

ASIC Approved SMSF Auditor · Chartered Accountant ·
Master of Business Administration · Master of Accounting ·
Bachelor of Banking & Financial Services

Elly's main role at Lee Green is auditing self-managed super funds prepared by external accountants. She also audits the financials for other profit and not-for-profit entities.

Highly-credentialled, Elly is a hard worker and loves engaging with clients and colleagues on auditing issues.

Elly is community spirited and loves helping out. She actively participates in Lee Green's corporate blood donation and volunteer programs. On weekends you'll find her walking, cooking, crabbing, photographing, gardening, watching AFL, catching up with friends or travelling.

SECTORS

SELF-MANAGED SUPER FUND AUDIT

FIONA SLADE

Client Services

Fiona is one of the friendly faces you see when you arrive at Lee Green and the welcoming voice on the phone. When not engaged in her client services tasks Fiona takes on accounts receivable, banking, invoicing and lodging returns.

She loves the variety of her role and meeting people from all walks of life and thrives on working closely with the Lee Green team.

Having seen children through school and sport, including basketball, Fiona has dedicated more than 14 years to various committees. She still enjoys watching her daughter playing cricket and netball, going to the football, reading, knitting, swimming and travelling.



CLIENT SERVICES



Relax and focus on the positive. Life is too short to worry about the negative. It's important to keep the positive in perspective in life and work, and when you do, your clients begin to share your optimism as well.

KELLIE HALBERDA

Executive Assistant to the Directors

You can never underestimate the role of an executive assistant, and Kellie throws herself into supporting Lee Green's directors with gusto. Kellie takes on administrative duties across the organisation, including reception tasks, liaising with clients, invoicing and assisting the directors and staff when necessary. If it needs doing, Kellie will be there to help.

Kellie treats every challenge as an opportunity, and no task is too great when it comes to supporting her colleagues, their clients and the organisation.

Kellie is an avid Adelaide Crows fan and loves watching the football. She loves the gym and keeping fit and healthy too.



EXECUTIVE ASSISTANT



When you help others feel important, you help yourself feel important too so work hard, be kind and amazing things will happen. I want to look back on my career and be proud of the work I have done and proud that I tried everything.

LEAH GROVES

Diploma of Accounting · Certificate IV - Leadership and Management



ACCOUNTANT AND
SUPERANNUATION SPECIALIST



There is nothing more rewarding than knowing you made someone's day a little easier or a little less stressful. I get the chance to do this on a daily basis and that's why I love what I do.

Leah's can-do attitude complements the supportive team at Lee Green where she enjoys the opportunity to learn, be involved in community and make a difference.

Helping clients understand the complexities of the superannuation system and giving back to community are important to Leah.

Leah's career highlights include initiating Lee Green's Wellness calendar of events and developing the Intern and Graduate Program.

She values being part of Lee Green's Reconciliation Action Plan committee and increasing her understanding of Australia's traditional owners and their culture.

You can always count on Leah to help, and this extends to being a regular volunteer with St John Ambulance SA, where she supports a team of event health services volunteers, co-chairs the Reconciliation Working Group and works as an Event Medic at events providing medical support to the community.

SECTORS

SELF-MANAGED SUPER FUNDS

LINA GUSEVA

Bachelor of Business · Certified Internal Audit Practitioner
· Graduate Certificate in Internal Auditing



AUDITOR



What could be better than a win-win situation? I follow my passion for improvements, always searching for the best way to get things done, assisting our clients to gain a fresh perspective.

Lina is passionate about change and improvements knowing a business will benefit by improving its processes. She always does her best by going beyond the auditing process to help clients find easier ways to do things, to reach their business goals and improve governance.

With more than a decade working on internal audits of multinational companies, Lina is a member of the Institute of Internal Auditors, and has recently completed her studies to gain a Graduate Certificate of Internal Auditing, ensuring she continues to challenge herself and build her skills.

Lina has Ukrainian origins, and she is involved in Ukrainian cultural dancing and art. She's always happy to learn about other cultures and new customs, constantly broadening her horizons.

LUKE HALL

Bachelor of Accounting (in progress)

Luke is currently studying a Bachelor of Accounting at Flinders University and has joined the Lee Green team as an Undergraduate Accountant.

Applying the knowledge he acquires throughout his studies as he learns the ropes from the senior accountants at Lee Green is Luke's current focus. He assists the team with processing tax returns, business activity statements and self-managed superannuation funds.

When asked what he loves about his job, Luke says it's being able to work with numbers each day. This, coupled with his love for basketball outside the office, makes us certain he's a great fit for the Lee Green team.



UNDERGRADUATE ACCOUNTANT



The team at Lee Green are friendly, helpful and truly care about their clients and the community.

**CORPORATE SECRETARIAL**

I feel really proud to work for an organisation that's committed to community work and participating in the world around us. We're all there to contribute and to help for a wider purpose, whether it's donating blood or raising money for charity. We share strong community values and we all want to make the world a better place.

RITA CAPORRELLA

Corporate Secretarial

Rita manages the company compliance activities for a range of corporate clients. She makes sure the boxes are ticked, there's a dot on every i and a cross on every t, especially when it comes to registering and renewing business names and undertaking property and land title searches.

Rita is committed to social responsibility. She coordinates many of the Lee Green team's corporate volunteering programs and Red Cross blood donations.

She gives back outside work too - as a committee member at the Westbourne Park Uniting Church Netball Club, coaching and as a team manager, and volunteering at Make a Wish Foundation. When time permits she loves to cook, play sport and socialise.

SECTORS

CORPORATE SECRETARIAL



CONSULTANT



One of the great aspects of my role is being able to see clients each year and catching up on life changes. Mentoring younger staff to make them better accountants is also rewarding, watching them learn and putting their new understandings into practice. I don't mind being mentored by younger staff in the various 'new' technologies either.

TIM MAJOR

Bachelor of Arts (Accounting) · Member of the Taxation Institute

Tim's somewhat of a tax "go to" around Lee Green, as well as having handy auditing skills, which he puts to work in the not-for-profit sector. His specialty is the childcare sector, and Tim has been committed to helping not-for-profits in the industry for many years.

Tim insists he's still waiting for his career highlight, but we know he takes great pride in mentoring younger colleagues to help them become better accountants, and we know they share their insights on how to use the latest technologies too. Mentoring definitely works both ways at Lee Green.

Tim is Lee Green's in house recycling champion, encouraging staff to dispose of rubbish correctly and reducing the environmental impact of the business in the process. Outside of work, Tim tries to avoid technology wherever he can and spend time in his garden.

SECTORS

CHILD CARE CENTRE AUDIT

PERSONAL TAX RETURNS

TRACEY JEFFERSON

Bachelor of Commerce · Bachelor of Business (Commercial Law) · Certified Practising Accountant



ACCOUNTANT



No matter where I am and where we work during these challenging times, I'm always there for our clients and the people who need our advice and support. It's about lending a hand at times of need, and there's nothing that makes you feel better than making someone's day easier!

Let's face it – not everyone understands finance, and when it comes to tax time, we need to rely on someone to translate figures into a return. Tracey does better than most, and at Lee Green she specialises in helping organisations and people with their tax returns, financial statements, BAS – and attends to client queries at the same time.

No matter if she's at her desk at Lee Green or in her home office, Tracey always meets her clients' needs in a timely fashion.

Life is about family for Tracey, and when she's not working with numbers she's spending quality time with her loved ones.

SECTORS

FAMILY BUSINESS

**BOOKKEEPER**

I love the variety in my job, especially visiting clients at their business, because no two are the same. I love their appreciation for me helping them do what I'm good at, so they can concentrate on what they're good at.

TRACEY SYKES

Reckon Accounts Accredited Trainer

Tracey's not one to spend the day at a desk, she's often out and about helping clients in their offices with their bookkeeping and BAS obligations. She's a friendly addition to any and every business.

Tracey has been part of the Lee Green team for over 30 years, and many other businesses have been counting her as part of their teams for many years too.

Always one to put her hand up, Tracey has taken part in many of Lee Green's corporate volunteering opportunities, and is the treasurer at her local tennis club. She's a keen hockey player, tap dancer, she has studied millinery at TAFE, and she loves knitting and sewing. Life is never dull for Tracey!

SECTORS

BOOKKEEPING**PAYROLL**

**PRACTICE MANAGER**

My passion is organisation, from a perfectly balanced bank rec to practical internal reporting, the support I provide gives the directors the decision-making tools they need to have our firm running at peak efficiency.

VANESSA SWEENEY

Advanced Certificate in Accounting

The saying goes that if you need to get a job done, give it to someone who's busy. Vanessa's working life is varied and fast-paced. She not only looks after the Lee Green firm accounts, reconciliations, payroll, budgets and reporting, she also oversees the marketing and administration functions.

Along with her administrative and management duties, Vanessa finds time to consult with clients where needed. She appreciates being hands-on across Lee Green and loves the variety.

Vanessa is community spirited like her colleagues, taking part in Lee Green's corporate blood donation program and Relay for Life.

SECTORS

SMALL BUSINESS **PAYROLL**

PROFESSIONAL SERVICES



GRADUATE AUDITOR



I love the supportive and kind-hearted people of Lee Green and the range of personal and professional development opportunities that are available to me.

WILLOW YU

Master of Professional Accounting

Joining our Lee Green team as an Auditor, it's no surprise that Willow's day is heavily focused on planning and preparation for her clients' audits. With a normal day consisting mainly of audit planning, performing substantive testing and preparing financial statements for her clients, Willow relies on her strong attention to detail to deliver high quality services.

Willow enjoys many aspects of her role, but none more than being part of the close knit team at Lee Green. The variety of work in her role as she works

with clients across various industries, provides Willow with a diverse range of experiences and challenges, which continually stimulates her interest in her role.

The professional development offered at Lee Green is another highlight for Willow, who enjoys learning and immersing herself in different experiences and cultures.

YVETTE GOSS

Advanced Diploma of Accounting

Easing client concerns about their superannuation funds' compliance and lodgments, along with their financial affairs, is Yvette's focus at Lee Green.

Yvette works closely with her clients' financial advisers to ensure they get the best advice available. She specialises in preparing financial statements and tax returns for self-managed super funds, also keeping up to date on superannuation rules and legislation, helping her clients and preparing other tax returns and lodgments.

She can't get away from numbers on weekends either – but mainly singles, twos, fours and sixes – by volunteering as a scorer for her local cricket club. She loves watching her son play football and cricket, and spending time with her grandson.

SECTORS

SELF-MANAGED SUPER FUNDS



I do the best work I can for the directors and our clients, and that includes giving our clients confidence and assurance that they're in safe hands with Lee Green. It's about helping others more than anything, especially when it comes to superannuation and compliance.

RUSSELL BEDFORD GLOBAL NETWORK

Lee Green is proud to be part of something bigger to ensure our clients can access the best of the global accounting network, by becoming the first South Australian firm to join the Russell Bedford International team.

The Russell Bedford International network is a connected group of accountancy firms, sharing knowledge and developing ideas. Our involvement provides global learning and connection opportunities, bringing real meaning to the term "business without borders".

From Adelaide and Darwin, Lee Green is connected globally through our clients and as part of the Russell Bedford network. Our reception clocks display local times at Lee Green and Russell Bedford offices and international client locations, reminding us of our connections.

Through networking opportunities we have identified we face similar challenges to other member firms, and we are working together to provide first class services to all clients. Support

from this growing network of professional firms – particularly around cloud computing and globalisation – provides a strength and scale beyond the resources of any one member.

"We are increasingly involved in cross-border transactions particularly in South East Asia and China, and our affiliation with Russell Bedford gives us the formal connections we have been seeking with advisers in other jurisdictions. We enjoy collaborating nationally as well, in supporting our existing clients and pursuing new business opportunities together."

Mike Sweeney, Principal



www.russellbedford.com

RECONCILIATION ACTION PLAN

The Lee Green Reconciliation Action Plan (RAP) provides a framework to support national reconciliation, including practical actions to drive our contribution internally and in the communities in which we operate.

Lee Green's RAP committee, assisted by our client Ochre Dawn Creative Industries, has developed our Innovate RAP, outlining actions allowing us to achieve our unique vision for reconciliation and building on our previous Reflect RAP. Our RAP commitments are aspirational and innovative, helping us gain a deeper understanding of our sphere of influence and establishing the best approach to advance reconciliation.

Since our RAP journey began in Adelaide and Darwin, Lee Green has:

- Employed our first Aboriginal cadet
- Further developed relationships with our indigenous clients and service providers

- Sponsored the Barunga Festival since 2016, allowing our staff members to immerse themselves in music, dance, sport and culture which they may not have otherwise considered
- Sponsored the Tiwi Bombers Football Club
- Attended the Garma Festival since 2017
- Provided Cultural Awareness Training for all staff, provided by our client, Haydyn Bromley from Bookabee Australia

Our RAP, which has been endorsed by Reconciliation Australia, is available for viewing on the Community page of our website.



leegreen.com.au/about/our-community

OUR COMMUNITY

MORE THAN A

Lee Green takes very seriously its responsibility to its clients and wider community. Our team has created a charities group to identify opportunities where we can assist not-for-profit organisations.



ACCOUNTING



- | Provision of pro-bono and reduced fee services to various not-for-profit organisations.
- | Regular Casual Days - with staff donations matched and directed to a range of charities. In the past, funds raised have helped the Salvation Army, Starlight Foundation and Animal Welfare League
- | Red Cross corporate blood donation program.
- | Habitat For Humanity volunteering in Cambodia.



RIDE WITH US ON YOU



OUR ROAD TO SUCCESS