

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

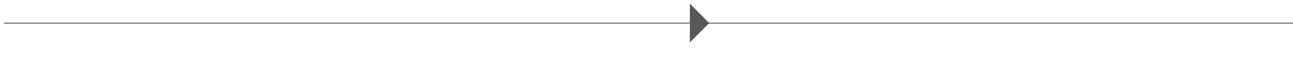


2

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

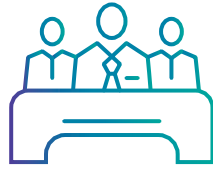
Other Accounting Services include:

- 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

PRINCIPAL



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.

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

DAVID CHARLESWORTH



PRINCIPAL

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



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 ENTERPRISES

FAMILY BUSINESS



PRINCIPAL

TSEPAK TSETSANG

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



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 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

PROFESSIONAL SERVICES

INTERNATIONAL / GLOBAL

LEAH GROVES

Diploma of Accounting · Certificate IV - Leadership and Management



ASSOCIATE DIRECTOR



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

INDIVIDUAL TAX

TRAINING

PROFESSIONAL SERVICES

SMALL TO MEDIUM ENTERPRISES

ALLY YICK

Master of Professional Accounting



ACCOUNTANT



I love the variety and challenge each day brings. While there are routine tasks, many assignments are unique, allowing me to continually learn, grow, and enhance my professional skills.

With a strong foundation in both accounting and audit, Ally plays a key role at Lee Green.

Her work spans across preparing tax returns for individuals, companies, and trusts, reviewing accounting transactions, assisting with client relocations and preparing Business Activity Statements (BAS).

In respect to audits, Ally supports the audit engagement team by analysing financial records, performing transactional testing and completing audit workpapers. Her close collaboration with the Manager – Audit & Assurance Services ensures a high standard of accuracy, regulatory compliance and client satisfaction.

No two days are ever quite the same.

What she loves most? The constant learning and the supportive, flexible environment that makes Lee Green a great place to grow.

Outside of work, Ally is a proud and dedicated mother who actively volunteers at her son's school when her schedule allows and looks forward to getting more involved in community events. She enjoys baking, cooking, catching up with friends and cheering on her son's activities.

Fluent in Cantonese, she brings valuable cultural and linguistic insight to our collaborative and inclusive team.

**GRADUATE ACCOUNTANT**

AUSTIN DENG

Bachelor of Accounting & Finance

Austin brings enthusiasm, curiosity and just the right amount of caffeine to get through the day. He starts each morning by checking emails and priorities before diving into bookkeeping, bank reconciliations, GST checks, BAS preparation, and drafting tax returns for all kinds of clients. He also compiles workpapers, responds to review notes, and gently chases clients for missing documents - all part of the job.

What he enjoys most is the learning curve. Whether it's BAS, tax, or workpapers, he loves picking up new skills and knowing that the work he does actually helps clients stay compliant and feel less overwhelmed at tax time.

Outside the office, Austin is committed to giving back. He volunteers with the RSPCA, helping with daily animal care and learning about shelter operations. He also donates blood through the Red Cross - something he's proud to do regularly.

When Austin is not working or volunteering, he's usually at the gym or catching up with friends over a drink. He's also a bit of an at home mixologist and enjoys experimenting with new cocktail or food recipes (some successful... some less so). Fluent in Mandarin and Cantonese, he brings both warmth and versatility to the Lee Green team.



I love the learning curve which I'm building skills across BAS/GST, tax returns, and workpapers. At the same time, it feels meaningful because the work genuinely help clients stay compliant, avoid issues, and makes tax time less stressful.



SENIOR ACCOUNTANT



I enjoy the challenge that comes with a diverse range of work, the opportunity to meet and work with different people and the flexibility the role offers.

CARRIE YEUNG

Bachelor of Commerce · Registered Tax Agent · Provisional Member of CAANZ

Carrie's role covers a diverse and rewarding mix of responsibilities. She prepares income tax returns and financial statements, manages STP and BAS compliance and supports clients with a broad range of business and tax matters. She also assists junior team members, sharing her knowledge and helping them navigate day to day work with confidence.

What she enjoys most is the variety the role offers. Working across different clients and matters keeps things interesting and allows her to build strong relationships along the way. Her Cantonese and Mandarin skills help bridge cultures and make communication smoother for clients and colleagues alike.

She enjoys meeting people, solving problems collaboratively and having the flexibility to balance her work in a way that supports both clients and the team.

Outside of work, she is actively involved within the Chinese community, contributing to programs that encourage connection, engagement and support. In her downtime, she enjoys dragon boat rowing and cooking - both outlets that let her recharge and stay creative.

SECTORS

PERSONAL TAX RETURNS

FAMILY BUSINESS

SMALL TO MEDIUM ENTERPRISES



MANAGER - AUDIT & ASSURANCE



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.

CHRISTOPHER LEGGETT

Registered Company Auditor · Approved External Examiner (Law Society of South Australia) · CPA · Bachelor of Commerce · Advanced Diploma of Accounting

With an Advanced Diploma of Accounting, Bachelor of Commerce and CPA under his belt, along with over 15 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, unlisted corporations, aged care entities and trust accounts. Chris is no stranger to managing many

different tasks with his team to get the jobs done.

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 services that has been provided to them. He loves working in a great team and cultural environment and finds the ability to share his expertise and experience with other team members especially rewarding.

SECTORS

FOR-PROFITS

NOT-FOR-PROFITS

TRUST ACCOUNTS

AGED CARE ENTITIES

ABORIGINAL 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

DESLEY EDWARDS

Diploma of Business Studies



ACCOUNTANT

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...



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.

SECTORS

FRINGE BENEFITS TAX

PERSONAL TAX RETURNS



SENIOR AUDITOR



I love my job because I ensure that we do our work diligently and deliver it professionally.

ELLY WONG

ASIC Approved SMSF Auditor · Chartered Accountant (CA) ·
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-credentialed, 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.

Fluent in Cantonese, Mandarin, and Fujianese, Elly brings valuable language skills to her role, enhancing her ability to connect with a diverse range of clients and colleagues.

SECTORS

SELF-MANAGED SUPERFUNDS

NOT-FOR-PROFITS

SOLICITOR TRUST ACCOUNTS

FIONA SLADE

Client Services



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.



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.

**GRADUATE ACCOUNTANT**

HANNA GRAY

Bachelor in Commerce (Accounting) · Bachelor in Business (Finance)

As a Graduate Accountant at Lee Green, Hanna brings dedication, care and a genuine love for helping people. She spends her days preparing tax returns and financial statements for individuals, trusts and companies, as well as assisting with the management accounting functions for our business clients.

What Hanna truly loves about her job is helping people. Whether she's calculating figures or clarifying a process, she enjoys making the tax experience smoother and less stressful for clients.

Her commitment extends beyond the office. She volunteers as an intermediate gymnastics coach and serves as the treasurer for her local gymnastics club.

Every Saturday morning, she shows up to support young gymnasts, encourage their progress and contribute to a club that has been a big part of her own life.

Away from spreadsheets and the gym floor, she enjoys quiet moments - doing puzzles, watching her favourite shows, and recharging for the week ahead. Simple, calming things that bring her joy.



I love taking on new challenges and enhancing my skill set.

KELLIE HALBERDA

Executive Assistant to the Directors



EXECUTIVE ASSISTANT

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.



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.

LINA GUSEVA

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

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.



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.

LUKE HALL

Bachelor of Accounting



ACCOUNTANT



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

Luke supports business and individual clients with BAS, tax compliance and the preparation of financial statements for a range of entities with a particular focus on Self Managed Superannuation Funds (SMSF's) as part of his day-to-day work.

Applying the knowledge he has acquired throughout his studies and during his time as an Undergraduate Accountant, Luke works closely with the senior accountants at Lee Green.

He has a strong passion for helping clients understand and make the most of their retirement planning and continues to expand his training and

skillset in the SMSF space.

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.

SECTORS

SELF-MANAGED SUPER FUNDS

PAYROLL

BAS SMALL ENTERPRISES



MANAGEMENT ACCOUNTANT



I enjoy the opportunity to support both our clients and internal teams.

MAGGIE YANG

Chartered Accountant (CA) · Master of Accounting and Finance · Bachelor of Business and Management

Maggie seamlessly handles everything from bookkeeping and payroll to budgeting and forecasting. Her passion for the job is evident in her meticulous financial management and the valuable insights she provides to help our clients and CRC team thrive.

What truly sets her apart is her dedication to making a difference. She loves supporting our CRC clients and their teams, ensuring everyone gets the financial clarity they need.

Fluent in Chinese Mandarin, she brings an extra layer of communication and cultural understanding to our diverse client base.

Outside of work, Maggie is a community champion, participating in professional training, team-building events and supporting donation initiatives. Her commitment to giving back is a testament to her dedication to both professional and personal growth. When it's time to relax, she enjoys unwinding with friends over a good movie.

SECTORS

COOPERATIVE RESEARCH CENTRES

MANAGEMENT ACCOUNTING



SENIOR ACCOUNTANT



I enjoy the variety and challenge that auditing offers, as no two clients or engagements are the same. Working in a supportive team environment where learning and professional development are encouraged is something I truly value.

MAX BI

Chartered Accountant (CA) · CPA · Registered Tax Agent ·
Master of Accounting and Marketing

Max brings strong technical skills and a relaxed sense of humour to the team. His professional toolkit reflects both expertise and a genuine drive to keep expanding his knowledge.

His weekdays revolve around problem solving - something he genuinely enjoys, even if he jokes that his favourite part of the job is "Everything?" Whether he's crunching numbers or helping clients navigate questions, he approaches each day with a practical mindset and steady focus.

His ability to switch easily between English and Mandarin, along with his bright personality, helps strengthen both internal collaboration and client relationships.

Outside the office, things get competitive. He's a passionate Mahjong player - quick to remind everyone that his Mahjong skills are absolutely off limits for criticism. He is also a beginner golfer, enjoys online games, and, surprisingly, doesn't mind a good house clean.

SECTORS

SMALL TO MEDIUM ENTERPRISES

FINANCIAL REPORTS **PAYROLL**



NIMANTHI GAMAGE

Chartered Accountant (CA) · Associate Member (ACA SL) · CPA · Reading for Master of Accounting and Finance · Bachelor of Science Finance (Special)

AUDITOR

Nimanthi brings plenty of skills and just as much curiosity to every engagement. She has already built a solid professional foundation and continues to expand her expertise through a Master of Accounting and Finance at Flinders University.

Her days involve planning and performing audit procedures, analysing financial information and working closely with managers, partners, and clients to understand business processes. From identifying risks to reviewing financial statements, she is committed to delivering thoughtful, high-quality audit outcomes.

Nimanthi is motivated by the challenge - every engagement represents an opportunity to learn

something new. She enjoys exploring different industries, solving complex problems, and helping clients strengthen their financial reporting. The supportive, growth-focused culture at Lee Green is something she truly values.

While not working, she enjoys spending quality time with loved ones, trying new recipes, and exploring new places. Passionate about personal growth, she likes to unwind with a good book or music while maintaining a healthy work-life balance.

Fluent in Sinhalese, she brings additional cultural depth and warmth to the Lee Green team.



I enjoy the variety and challenge that auditing offers, as no two clients or engagements are the same. Working in a supportive team environment where learning and professional development are encouraged is something I truly value.

SECTORS

FOR-PROFITS

NOT-FOR-PROFITS

ABORIGINAL CORPORATIONS



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 volunteer at Make a Wish Foundation. When time permits she loves to cook, play sport and socialise.

SECTORS

CORPORATE SECRETARIAL

SNEHA KARKI

Master of Professional Accounting · Master of Business Administration

Sneha is the powerhouse behind the scenes in Darwin, keeping everything running like clockwork. From managing accounts payable and receivable to reconciling bank statements and supporting remote motel operations, she brings precision, reliability and a calm efficiency to every task.

A typical day involves processing transactions, preparing reports, and liaising with clients—all while ensuring everything stays compliant and organised. She thrives on structure and attention to detail and values the flexibility and work-life balance her role offers.

Away from the desk, Sneha is all about fresh air and meaningful moments—whether she’s camping under the stars, hitting the road for a weekend adventure, diving into a good book or spending time with loved ones.

With fluency in Nepali, she helps foster inclusive communication within our team and enjoys giving back through community volunteering and supporting local initiatives.

SECTORS

INDIGENOUS BUSINESS



ACCOUNTANT



I enjoy the structure and attention to detail that my job requires. It’s rewarding to help clients stay compliant and organised.

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



TRACEY SYKES

Reckon Accounts Accredited Trainer

BOOKKEEPER

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!



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.

SECTORS

BOOKKEEPING

PAYROLL



MANAGEMENT ACCOUNTANT



I can always learn from different areas, there are lots of new challenges

ULLA CHAN

Master of Commerce (Major in Information System and Accounting)

With a passion for learning and a love of variety, Ulla brings energy and adaptability to every task at Lee Green. Armed with a Master of Commerce, she spends her days processing accounts and delivering high-quality management reporting for both Australian and overseas clients, with a focus on large business and Indigenous organisations, Ulla's accuracy and attention to detail help the team to provide meaningful insights to clients

She loves that her role constantly keeps her on her toes - there's always something new to learn and tackle each day.

Adelaide is still new to her, and while she hasn't had the chance to dive into community life just yet, she's been embracing her interests outside of work. Whether she's playing tennis, painting, or watching Asian dramas, she finds joy in both creativity and activity. With plans to learn horse riding, shooting, and flying, she's never short of new goals.

She speaks Cantonese and Mandarin, adding valuable language skills to her professional toolkit and the team.

SECTORS

BOOKKEEPING **PAYROLL**

MANAGEMENT ACCOUNTING

**BUSINESS PROJECTS COORDINATOR**

VERENA STEEN

Business Projects Coordinator

With a background in paramedicine and law, Verena brings a unique blend of skills to her role

A typical day for Verena is anything but typical! She's always behind the scenes, reviewing client statuses, tackling projects to streamline business processes, and organising training and wellness activities. This variety keeps her days productive and engaging.

Outside of work, Verena is a community dynamo. She volunteers for various organisations, including Estara, where she spends quality time with a friend in a wheelchair, and St John, where she organises medical training for members and serves as an Emergency Medic.

In her free time, Verena loves being active and outdoors. You'll find her doing CrossFit, stand-up paddleboarding at the beach or camping with friends.

Fluent in German, Verena adds valuable language abilities to our team.



Every day is a little bit different. I have the pleasure of working with great people, in a good environment and seeing the difference that we make.



YVETTE GOSS

SMSF Specialist Advisor • Advanced Diploma of Accounting

MANAGER & SMSF SERVICES

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 grandchildren.



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.

SECTORS

SELF-MANAGED SUPER FUNDS

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."

Ben Spiers, 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