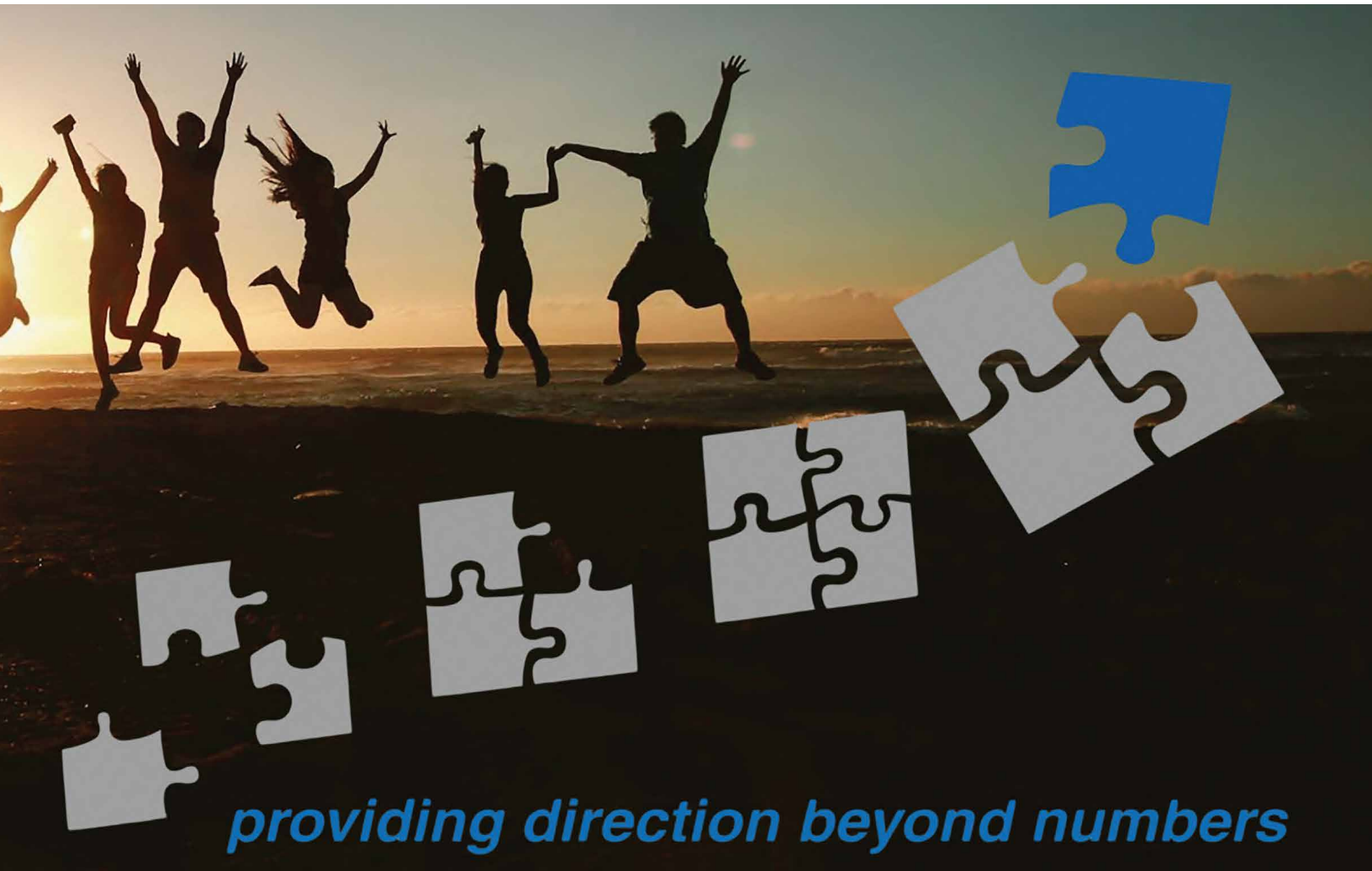


# **Gartly** Advisory

CHARTERED ACCOUNTANTS

*Chartered Accountants and Business Advisers partnering with small business and individuals on their financial journey and success!*



*providing direction beyond numbers*



## Welcome to Gartly Advisory – Chartered Accountants

Step into the realm of redefining your financial landscape with Gartly Advisory!

In today's fast-paced world, finding an Accountant with an unwavering zeal for the passion of Small Business is paramount. Nestled in the heart of suburban Melbourne, Ormond, Gartly Advisory is the go-to accounting firm for all innovative and professional advice for all things in business and tax.

As Chartered Accountants, we sculpt bespoke strategies tailored to the unique needs of both our business and personal clientele, steering towards avenues of business expansion, tax optimization, wealth estate planning and business exit planning.

Our Advisory Services form the cornerstone of our approach, encompassing the entire spectrum from inception to growth to graceful exit, all aimed to propel your business strategy. But we don't stop at mere compliance. At Gartly Advisory, we epitomize proactive professionalism, cutting through the financial jargon to deliver straightforward advice and decisive action.

With us, you're not just a client; you're a partner in progress. We stand ready to offer personalised service and uphold the principles of integrity and unwavering support for you, your business, and your family.

Within our compact yet dynamic team lies an unwavering commitment to delivering unparalleled client service. For over two decades, we've woven a tapestry of trust, loyalty, and a shared vision with our clients, yielding extraordinary outcomes.

Founded in the dawn of the millennium, Gartly Advisory was founded by Geoff, bolstered by the steadfast support of his wife Vicki and an exceptional cadre of Professional Accountants and support personnel. Anchored in the vibrant community of Ormond, our practice has been a pillar of support for local businesses for many years. We welcome you to talk to us about your needs

## Small team big service

We are a small dynamic team with a considerable emphasis on personal client service and providing our clients with the right practical professional advice.

Our success after 24 years is based around trust, loyalty and shared vision of partnering with our clients to achieve amazing results.

Gartly Advisory was established in the year 2000. Geoff is supported by his wife Vicki and a fantastic team of Professional Accountants and support staff. The Practice is based in Ormond and has been part of the local community for many years.

## What we do

We specialise in advice for Small Business and high worth Individuals who want to grow their business, so they can pursue the enjoyment of their financial freedom. We help clients that are large and small. Gartly Advisory undertakes all the standard stuff that other accountants do, but we do it in a way that you can understand:

- Taxation
- Accounting – reporting analysis and accounting systems
- Cashflow analysis and finance assistance
- Business planning
- Self-Managed Superannuation Fund – advice, establishment, ongoing administration including pensions
- Business Exit Planning & Estate Planning

We use whatever accounting system you utilise and are not constrained by brand. We will work with what is best for you. We can adapt quickly to how you get things done.

Our advice is straight forward free of jargon and clear.

## Our Mission, Vision and Values



Through expert knowledge, we provide taxation, Business Planning and innovation to our Business Clients. We do this with integrity, reliability and efficiency, every day!



Our Vision is to be a leading guide in our Small Business Community. We will provide an environment that grows both clients and our team in business and life successes.



Integrity & Communication  
Teamwork & Innovation  
Learning & Continuous Improvement  
Reliability, Respect & Courage

## How we differ from others

Our 3 step approach ensures we grow to be a vital partnership in your business journey.

**Step one** - Understand your needs and pain points - how can we help?

**Step two** - We act as a sounding board for your business ideas to help you realise your business and personal goals

**Step three** - We engage in making sure you achieve what's needed to be done from tax compliance to expansion and exit from your business.

We aim to assist clients navigate tax and everyday accounting issues that impact on their business.

We use the Value Builder network to help our clients discover hidden value in their business that assists with business growth and exit planning.

Our extensive knowledge is available to assist you in meeting your compliance issues, develop your accounting systems and overall business strategy.

Our proven process helps businesses to plan, develop and enjoy the future of their business vision.



## Example of how we help our clients

Here is just a selection of client examples of what we do:

### Growing Pains!

Meet Scott. When we met Scott, his business was growing but suffering under pain of growth. The business systems were outdated. Scott was operating from month to month with no long term plan.

We changed his approach by assisting him to develop his plan and map out his vision, including a financial plan. The plan included addressing his structure, taxes and his personal aspirations. Over two years, we assisted him to refocus the business towards growth and direction. Taxes became less of a burden, and profit and expansion became the focus.

### The Pain of Tax

Jane had allowed her tax lodgements to fall behind. With our help and understanding, we managed to assist her in focusing on the job at hand. We are happy to say her lodgements are now up to date and business is going well. We are assisting her by proactively undertaking tax planning rather than being chased by the Tax Office.

As you can see our accounting services range from general accounting to assisting clients in focusing on their business and direction.

### My revenue is up, but my profit stinks

We often help clients to make sure that the costs are not weighing too heavily on the bottom line. Our dynamic approach makes sure we find those profit leaks.

## SMSF licensed advice

**Geoff Gartly** is Limited Authorised Representative 1248227 of Merit Wealth Pty Ltd, Australian Financial Services Licence 409361, ABN 89 125 557 00

This means Geoff is authorised to provide advice on establishment, setup, ongoing administration, pensions and windup of a Self Managed Superannuation Fund. Not every Accountant can do this! Geoff is registered as an SMSF specialist and understands how an SMSF can help your small business.

We look after many clients SMSF and are happy to provide you advice if needed in this area.

CA SMSF Specialist



# Gartly Advisory

Pty Ltd

CHARTERED ACCOUNTANTS

## Client testimonials

We have lots of happy clients and testimonials.

Here is just a small selection from our Google testimonials from happy and satisfied clients. We encourage you to check them out on our Google or Facebook page.

*Wonderful people who care about their clients. I can't recommend Geoff and the team enough.*



**Nerida Wines**

*Friendly and helpful people who genuinely care about their clients.*

*Highly recommended. I appreciate your advice and assistance over the years, Geoff*



**Attila Csaplar**

*Since joining Geoff & his team, our business has gone from strength to strength.*

*With Geoff's excellent guidance we have been able to not only grow our business but also run it more efficiently*

*We are extremely happy and appreciative of everything you do for us.*



**Barbara  
B & A Concrete Pumping Services**

If you would like to know more about us, then we encourage you to link in with us on Facebook or read our website blogs that we regularly update

### How to engage with us!

To start the process, we suggest a quick meet up to explore your needs. We can meet in person or online via zoom or phone, we are flexible and prompt.

Reach out to us by contacting us to discuss your needs further:



[info@gartlyadvisory.com.au](mailto:info@gartlyadvisory.com.au)



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