

OUR STORY

Presenting the William Buck Philosophy



*Changing
Lives.*

OUR MISSION

We're more than just advisors; we aspire to create a positive change in the lives of our clients and our people.



WHY WILLIAM BUCK?



THE WILLIAM BUCK BOARD

From left to right

Jamie McKeough

Managing Director, Adelaide

Clyde Young

Managing Director, Auckland

Nikolas Hatzistergos

Chairman & Managing Director,
Sydney

Junaide Latif

Managing Director, Brisbane

Lindsay Holloway

Managing Director, Melbourne

Mark Collins

Managing Director, Perth

This question has as many answers as we have clients.

The ideas, solutions and results we provide are extensive and varied. One constant, however, is the desire to make a difference which lies at the core of everything we do.

As early as 1895 our firm's founder, Mr William Buck, recognised that we have the potential to make a lasting impact on those around us and set up a firm to do just that. A century later, our people continue to be motivated by this exciting opportunity.

Throughout our history, we've made a difference to individuals, businesses and community organisations with a particular focus on the mid-market. Remaining true to our core client base has enabled us to develop a depth of knowledge and expertise specific to their needs.

Our people lead with expertise and passion, serve with purpose and professionalism and love to share their insights and expertise to help our clients and the wider community achieve results.

Today, we are considered one of the most progressive firms in Australia and New Zealand and have the ability to offer a full range of integrated business and financial solutions.

On behalf of the Board, I'd like to thank our people who make a difference every day, and our clients who inspire us to do so.

Nikolas Hatzistergos

Chairman

CHANGING LIVES

William Buck's strength lies in our unique philosophy, summed up by the phrase, Changing Lives.

We've developed this philosophy in recognition of the role we play in the lives of our clients, employees and the wider community. Everything we do has the potential to have an impact; whether large or small.

As a phrase, Changing Lives is simple, but very powerful.

It motivates our clients and partners to realise their dreams. It drives innovation and creativity, as we develop original solutions and seek new ways to create positive change. It promotes a culture of accountability, and it inspires our people to work as a team and give their best; supporting retention and recruitment.

As a philosophy, Changing Lives has allowed us to build a firm that's been making a positive difference for over 120 years.



Clients and friends of the firm often tell us that William Buck is different, that we're more than just advisors. We have a real impact on their lives, as our philosophy, Changing Lives is present in everything we do.


OUR CLIENTS

We're more than just advisors to our clients. We provide the support, insights and expertise they need to realise their goals and overcome their challenges.

Often we help clients at the most pivotal points in their lives – starting and growing businesses, managing succession, undertaking transactions, preparing for retirement or even assisting with their estate management.

But it's not just the pivotal moments that matter, our advisors also support and add value to our clients in their day-to-day businesses and circumstances.

This approach has led to a proud reputation for creating strong long-term relationships built on trust.



“Our family’s had a working relationship with William Buck for over 40 years. They’ve been our greatest allies and outcomes have been significant; outstanding growth in sales, financial stability and most importantly peace of mind. We know we’re in good hands.”

Tim Rugless, Managing Director, Rugless Family Foodland

CHANGING LIVES

OUR PEOPLE

Changing Lives is the cornerstone of our culture. As a philosophy it's aspirational; it's about embracing change, never becoming comfortable with the status quo and seeking new ways to live a fuller life both personally and professionally.

We've learnt that empowerment leads to productivity and innovation. Opportunities are provided for employees at all levels. We aim to promote from within and provide the necessary training and development for success. We challenge our people with a variety of work and encourage them to step outside their comfort zones. In hand with this is the ingrained recognition of accomplishments and hard-work.

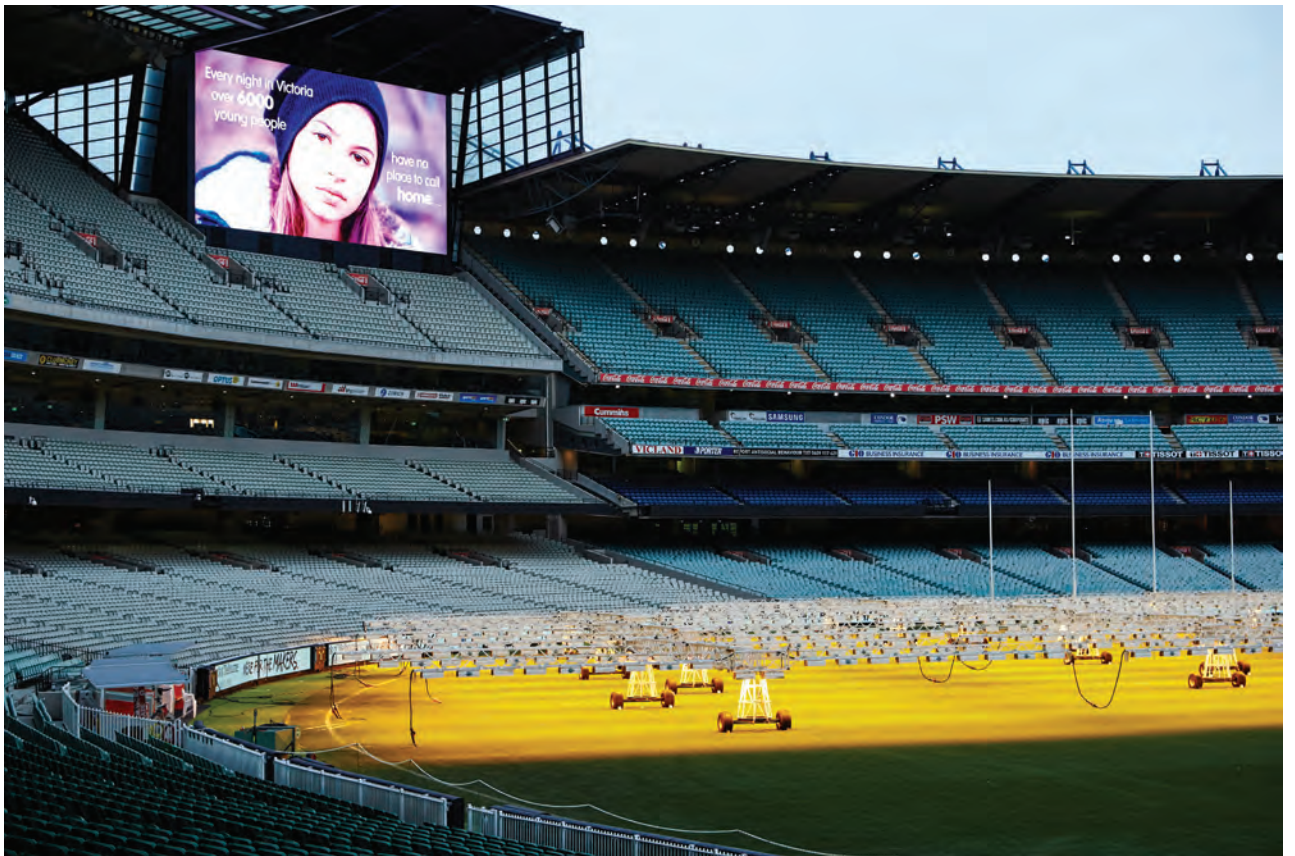
Expanding our knowledge sharing forums across Australia and New Zealand, we give our people the scope to learn from one another and work together as one team regardless of their location.

Above all, the ability to embrace change is dependent on trust. By providing a supportive environment, our people are encouraged to pursue their dreams.

"It's one big team at William Buck. Achievements are celebrated, care is taken and time is invested, and it's these little things that are important to me. I've been given unbelievable opportunities, including a secondment to the US, which have changed my life professionally and personally for the better."

Domenic Molluso, William Buck Audit Director





OUR COMMUNITY

Our strength and position in the market put William Buck in the perfect position to be agents for change in the community.

Tapping into the issues that are important to our people and clients we undertake a range of initiatives to raise funds and awareness, and provide hands-on support for charities and organisations most in need.

Our senior people also lend their time and expertise to not for profit organisations through a number of activities including pro bono work and non-executive directorships. Yet our responsibility to the community is not limited to charity work. As advocates for our clients we invest significant resources in lobbying government agencies and participating in committees to help shape economic and legislative policy. Ultimately helping to improve the world around us.

As key players within our industry, our advisors also contribute greatly to the accounting profession providing education courses, writing research papers and undertaking key roles within Chartered Accountants Australia and New Zealand and other peak bodies.

Pictured opposite from top

'Sleep at the 'G'

The field at the Melbourne Cricket Ground with the stadium screen promoting the 'Sleep at the 'G' event, creating awareness for homelessness.

Team William Buck

The William Buck participants inside the Melbourne Cricket Ground, taking part in the recent 'Sleep at the 'G' event.

We believe it's essential to make a broader contribution to society. We're proud of our engagement and advocacy on important issues, and support of community projects that have a positive impact on people's lives.

OUR APPROACH



STRATEGIC AND PRACTICAL SOLUTIONS

Whatever your needs, William Buck has the expert resources to create the best outcome for you and your business.

We work closely with business owners, senior management, board members and individuals to look beyond the immediate opportunity or issue.

Drawing on our extensive experience in the mid-market, our advisors will challenge your thinking and re-frame problems to understand their root cause. Our industry and technical experts can also help you anticipate the game-changing movements in your industry and understand trends beyond the boundaries of your business.

Analysing your situation from multiple viewpoints allows us to develop progressive strategies that achieve results.

With an understanding that strategy is nothing without execution; our solutions are commercial in nature and our advisors provide the necessary support to ensure they are effectively implemented.

Delivered with a common-sense approach our recommendations are practical and jargon-free, allowing you to get to the heart of the matter quickly.

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As a fully integrated firm of Chartered Accountants and advisors, William Buck provides a complete solution. Our common-sense approach combines technical acumen with commercial understanding leading to practical and enduring results.

OUR APPROACH



360 DEGREE SUPPORT

A multi-disciplinary firm that puts you at the core of its business.

As a client of William Buck you'll benefit from our integrated services model.

We'll listen closely to your needs and bring together a team of relevant professionals across a number of specialities and locations; providing a responsive, customised solution.

Led by a single point of contact, our advisors work seamlessly behind the scenes to ensure that careful consideration is given to all areas of your business and personal financial affairs. This includes helping professionals and family groups with the challenges of managing wealth, complex tax restructures, generational change and succession planning.

And as your circumstances change, our advice will continuously adapt to your evolving needs.

Bringing our services together in a truly integrated manner ensures that you receive the right advice at the right time and derive long-term value from your relationship with us.

That's what we mean by 360 Degree Support.

HOW WE CAN HELP:

01 AUDIT & ASSURANCE

We customise our audit services to the size and nature of your organisation, aligning world class standards and methodologies with your business goals and associated risks. This means more efficient service delivery, and ensures we focus on the critical areas of risk that could have a material impact on your business and its financial results.

- External Audit
- Internal Audit
- Financial Reporting Advice
- Risk Management
- Fraud Investigation & Prevention
- Sarbanes Oxley Act Compliance
- IT Assurance
- Preparation of Financial Reports for Disclosing Entities

02 BUSINESS ADVISORY

Working closely with you and your management team, our business advisors can help you plan and implement contemporary business strategies and practices to meet your business's full potential.

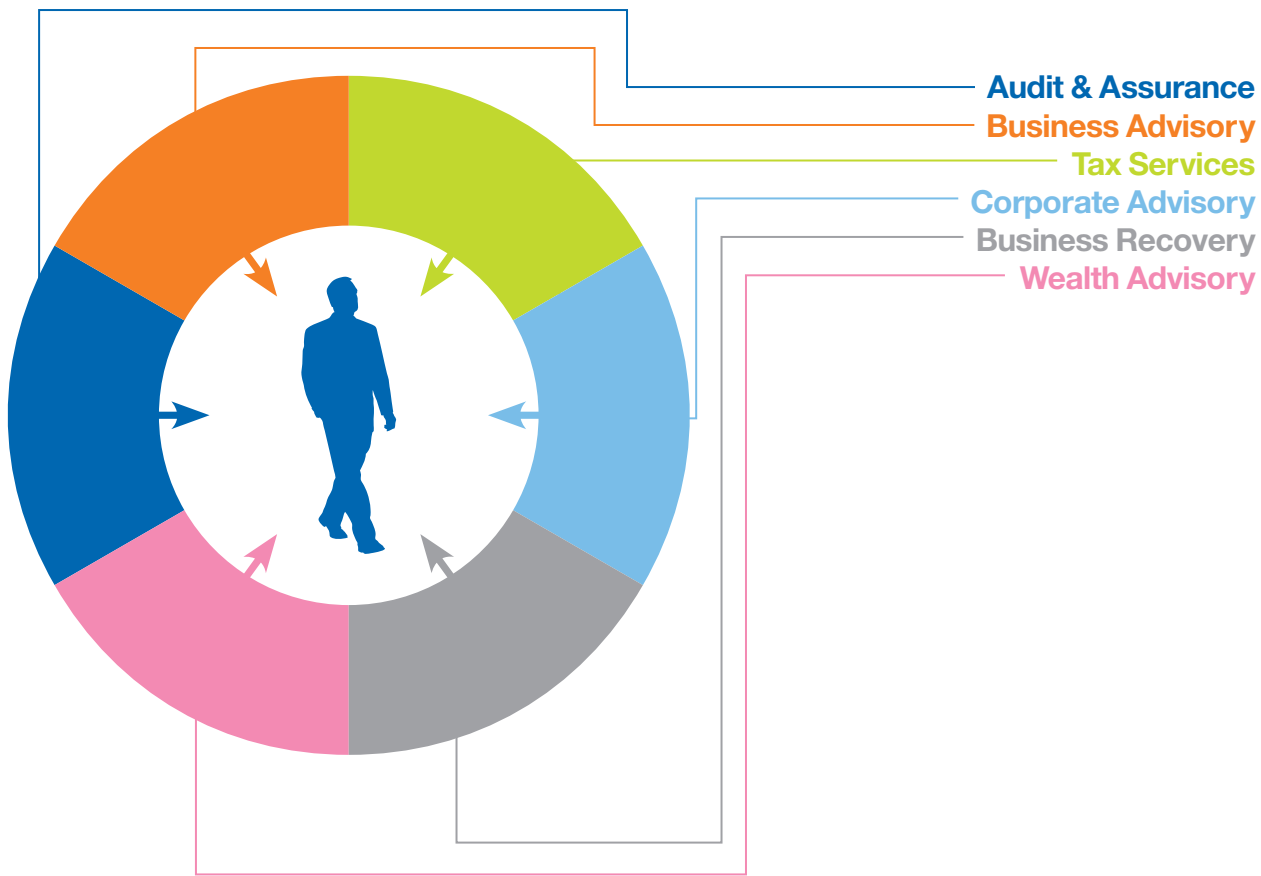
- Accounting & Tax Compliance
- Strategic Business Advice & Planning
- Business Performance Management
- Budgeting & Forecasting
- Debt Structuring & Finance Applications
- Restructures & Asset Protection
- Superannuation Compliance
- Business Succession Planning
- Outsourcing, Bookkeeping & Payroll Services

03 TAX SERVICES

William Buck has some of the leading tax practitioners in Australia and New Zealand, who specialise in delivering practical, cost effective tax solutions.

Understanding that clients want to get to the solution quickly, we offer clear, responsive advice to manage your tax risk, address local and international tax issues, and develop strategies to utilise tax concessions and planning opportunities.

- Tax Planning
- Complex Tax Advice
- Tax Audits, Disputes & Private Rulings
- Tax Risk Management
- Structuring & Restructuring
- Indirect Tax
- International Tax & Transfer Pricing
- Remuneration Planning



Audit & Assurance

Business Advisory

Tax Services

Corporate Advisory

Business Recovery

Wealth Advisory

04 CORPORATE ADVISORY

Our Corporate Advisory team provides objective, strategic and commercial advice across a broad range of business issues. Our work spans the breadth of the transaction process from the origination of ideas, to managing the transaction process, valuation, and structuring.

- Acquisitions & Divestments
- Complex Financial Modelling
- Debt & Equity Capital Raisings
- Due Diligence Assignments
- Forensic Accounting
- Investigating Accountant's Reports
- Independent Expert's Reports
- Purchase Price Allocations & Impairment Testing
- Valuations

05 BUSINESS RECOVERY

Our business recovery team aims to assist individuals and businesses in trouble as early as possible, helping them to restructure and trade out of hardship.

Approaching each appointment with a 'big picture' view and attention to detail, our advisors work to achieve optimal results for all stakeholders.

- Voluntary & Official Liquidation
- Receiverships
- Deed of Company Arrangement
- Lender Security Reporting
- Bankruptcy & Consultancy Advice
- Restructuring & Turnaround Solutions

06 WEALTH ADVISORY

By understanding not only what you want to achieve but why it is important to you, our wealth advisors can create strategies attuned to your key priorities. The end result is a plan focused on the attainment of your life goals as well as the accumulation of assets.

- Financial & Strategic Investment Advice
- Wealth Creation Strategies
- Portfolio Management & Administration
- Self-Managed Superannuation Strategies & Advice
- Estate & Succession Planning & Administration
- Risk Management & Life Insurance Advice

A PROUD HISTORY OF CHANGING LIVES

Celebrating over 120 years of success, the William Buck story is one of enthusiasm, determination and vision.

In 1895, in the midst of economic depression, Mr William Buck fulfilled his dream of starting an accounting practice. With a passion for helping people and their businesses reach their full potential, William Buck soon built an irrefutable reputation among the Melbourne business community as the firm of choice; a reputation that has stayed with the firm as we've expanded across Australia and New Zealand.

Over the next 30 years, Mr Buck went on to help a diverse range of clients, from small family businesses to mid-market corporations, and his practice became a tremendous success.

William Buck's desire to help the business community extended beyond his own firm; his goal was to raise the quality of the Australian accounting profession. Founding his own accounting school, he helped thousands of students attain their professional qualifications and be admitted to the Institute of Accountants, forerunner to Chartered Accountants Australia and New Zealand.

A role model for our current leaders, William Buck was described by his students as courteous, generous and a "true friend"; taking a personal interest in each of his students and providing a life changing experience.

Joining the firm in 1925, William Buck's son, Bill Buck Junior, took the helm shortly thereafter. Known as a man of clear thinking and 'ever ready' wit, he was popular among his clients and the wider community. Using his position of influence for the positive Bill Buck became closely involved in numerous community boards and associations; activities that have become a cornerstone of William Buck's culture.

An impressive figure in his own right, Bill Buck continued to guide the firm throughout the 50s, 60s and early 70s.

The remaining decades of the 20th century saw the firm develop a national presence and introduce speciality services. This multi-disciplinary approach became the start of the *360 degree support* offered today. With a wide range of services William Buck is now able to help our clients to grow and prosper in more ways than ever before.



Pictured above from top

Mr William Buck
Founder of the firm.

The Buck Family
Mr and Mrs William Buck
and children.

"It is not for us to define excellence. The quality of our work will be decided by the people and businesses that we help."

Mr William Buck, Founder

LOCAL KNOWLEDGE, GLOBAL REACH

With offices across Australia and New Zealand, William Buck has a strong presence in the region and is well placed to meet the needs of your business on both sides of the Tasman.

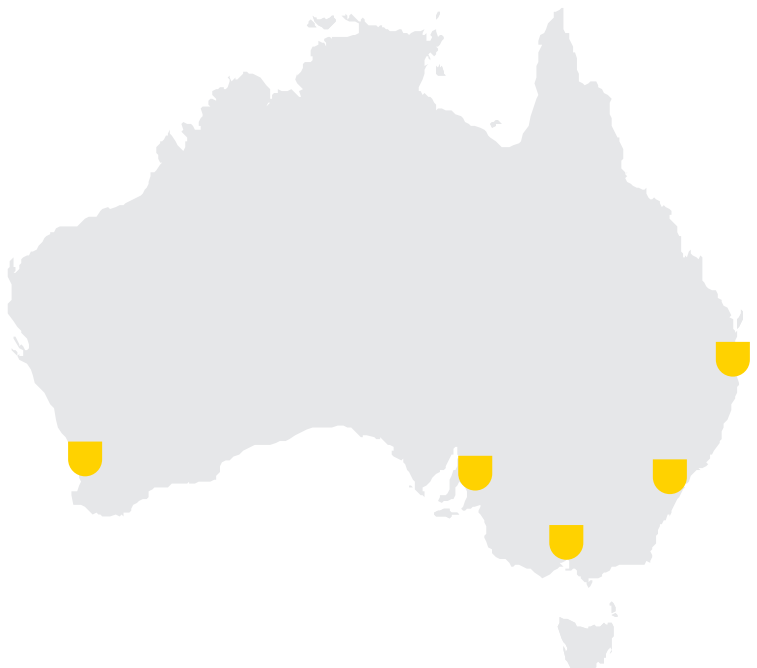
Our local team is supported by our extensive global network, Praxity. As a member of Praxity, the world's largest international accounting alliance, William Buck has access to over 40,000 professionals in 103 countries.

Praxity participants are selected for their size, strength and leadership positioning with strategic geographic relevance, representing an unrivalled global resource and knowledge pool.

The Praxity alliance allows us to leverage this knowledge to your advantage. Wherever you choose to operate, we can assist you with advisors 'on the ground' who understand the local regulations, financial reporting requirements, tax systems and customs.

“At Praxity we're unashamedly selective. The professionals at William Buck share Praxity's ethos of quality service, technical acumen and a can-do attitude.”

Graeme Gordon, Executive Director of Praxity



Australia

- New South Wales
- Victoria
- Queensland
- Western Australia
- South Australia

New Zealand

- Auckland
- Bay of Plenty

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