

# Services for Privately Held and Family-Owned Businesses



“Increasingly, we see ourselves as wealth managers to our clients who own businesses. We seek long term relationships and provide services focused on the owner, not just the business. The integration of this service delivery is unique.”

---

**Robert Quant**

National CEO

Grant Thornton Australia



# Working in partnership with you and your business

## **At Grant Thornton our focus is you.**

Grant Thornton has built its name on helping business owners achieve their ambitions. We develop a close, long-term relationship with our clients. We work to understand your needs and aspirations and then tailor our services to meet your goals. Our collaborative approach achieves maximum results both for the business and, more importantly, the owner.

You will deal directly with our directors. Our vast breadth of technical expertise means you benefit from our innovative solutions. We are passionate about growing your business.

As a member of Grant Thornton International and with offices in Adelaide, Brisbane, Melbourne, Perth and Sydney, we have the national and international scope to help you achieve success, wherever your business may grow.

## **The Business Life Cycle**

Our advisors are well versed in the challenges a business may face during its life cycle. Our expertise and knowledge has been gained by working closely with businesses like yours.

We empathise with the anxieties of starting a business, from the regulatory red tape through to capital raising. We also understand the issues and dilemmas business owners face when exiting a business and the many options to be evaluated. We're here to assist you through every stage, make life easier for you and help you sleep at night.

“My business has gone through a lot of changes in recent times and having Grant Thornton’s assistance with business planning and implementation has been invaluable. I know they are as committed to the success of my business as I am.”

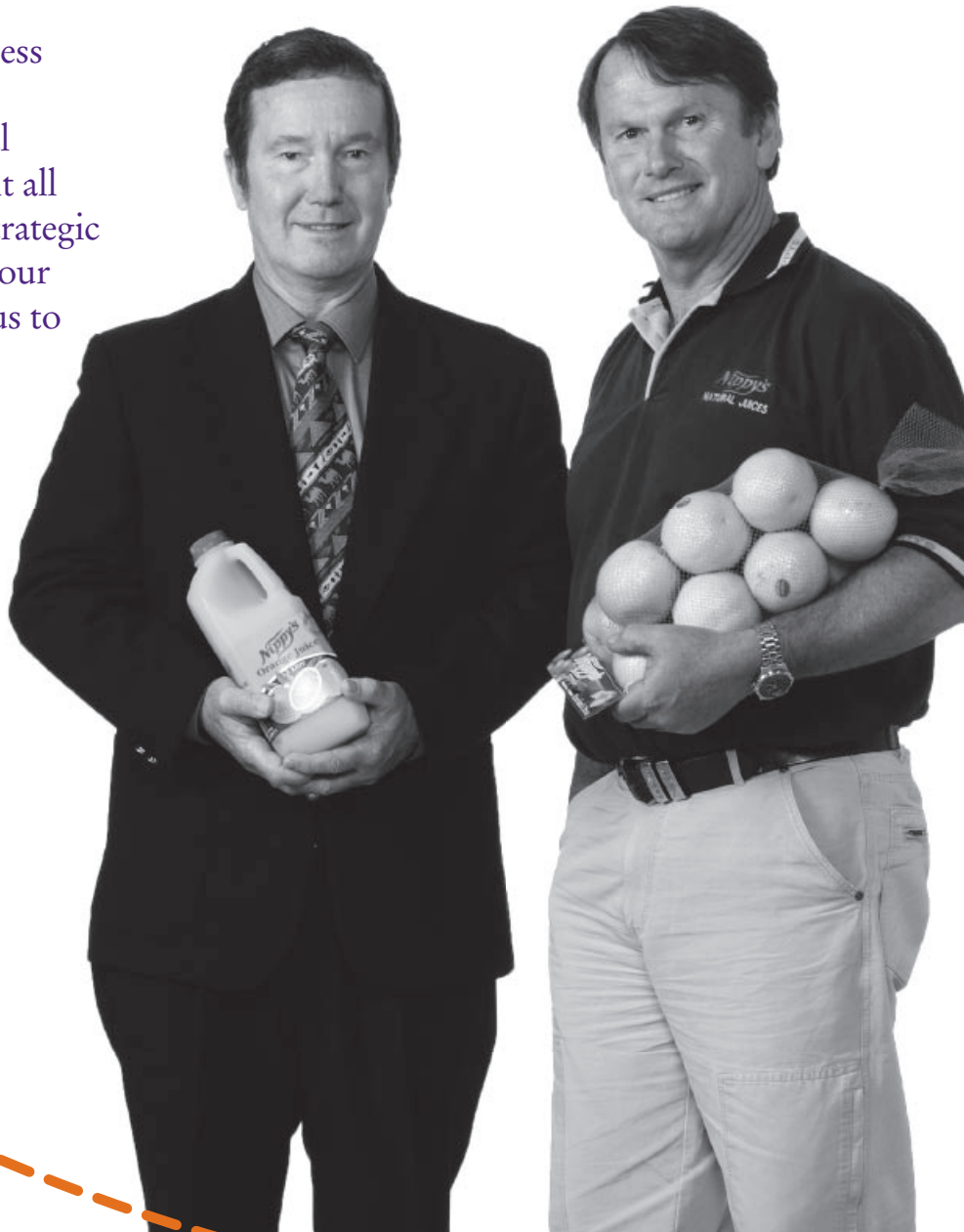
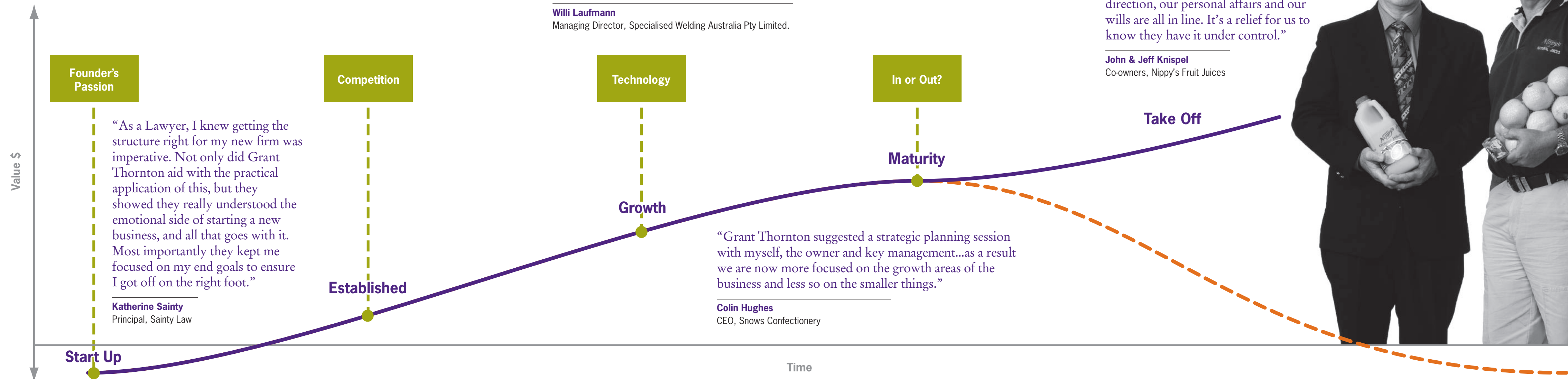
---

**Maria Tapper**

Owner, Container Swinglift Services



# The Business Life Cycle. Where do you fit in?



## Start-up stage

Starting a business can be exciting, challenging, fun, frightening and rewarding – often all in a single day. This can be an emotional time for most business owners.

Your business deserves every chance to succeed. Grant Thornton has partnered with many new businesses to help them get off to the right start. From the outset (and regularly over time) Grant Thornton directors take clients through an intensive strategic planning process. During this time we challenge our clients as to their preconceptions of the business, where they see their future, their goals and how they expect to achieve them.

## Start as you mean to go on

Getting the right business mix and model to meet your aspirations requires strategic planning.

Planning highlights important issues that will have an impact upon your company’s performance. Issues such as structuring, asset protection, financial and working capital modeling and regulatory requirements are crucial to your future success.

Most importantly we challenge our clients to consider the exit stage right from the start. What is the purpose of the business? What is the exit strategy for the owner?

The benefits of planning are realised when the owner decides to sell their asset. Creating a saleable business from an early stage will allow you to work to maximise its value at the time of exit.

## Growth stage

Grant Thornton advisors understand the need for tailored growth strategies that deliver results. We have a robust appreciation of the factors that govern growth and profitability.

Our business health check allows the owner to gain an insight into how the business is performing against its goals and previous planning. We also advise on tax planning and asset protection throughout the growth phase.

We assist clients to manage cash flow carefully. Businesses that experience rapid growth risk using existing cash reserves to fund the business, ultimately ending up with no cash for day-to-day operations. Our specialists provide solutions and expert advice tailored to your needs, ensuring that you stay out of the red.

## Maturity stage

You have built your business into what it is today. You may then question “what else do I want to accomplish?”

Should I seek additional funding to expand overseas? Do I have the drive to expand my business into new markets? Have I achieved my business dream?

Through a strategic assessment, we identify where your business is and where it is likely to go. Collectively we help you develop a clear plan to achieve your goals.

Our unique approach takes into consideration tax planning, structuring, financing, working capital management, wealth extraction and succession issues. Critical to the maturity stage is succession planning or an exit strategy.

Succession planning may not be about immediate exit, but is designed to prepare the business for a ‘sale’ where you determine the timing. It’s putting in place the right mechanisms for the business to run profitably and to increase its value.

## Exit options and advice (succession, expansion or exit?)

The decision to sell or exit from a business can be an emotional and stressful time. For most business owners it will represent the culmination of a lifetime’s work, the payoff for years of effort and dedication. We can support you throughout the process, from your initial decision to resolution.

Ensuring that you sell your business to the right owner at the right time and for the right value is essential. Exiting a business needs to be timely and well planned. We ensure that our clients and their businesses are ready emotionally, professionally and financially before entering into the sale process.

Grant Thornton’s experience in grooming a business for sale has helped secure millions of dollars for business owners Australia wide. We make the businesses value instantly recognisable to a potential buyer.

## Where to next?

Not only do we help to minimise your tax obligations from the sale but also help you to extract and invest your well earned wealth through our transaction support and wealth management services.

Deciding how and where to invest your wealth can be a daunting task. Our independent financial advisors will develop an investment strategy tailored to suit your needs – a strategy that allows you to be in control of your finances.

Time to relax? Time to holiday? Or time to start a new business venture?

Whatever your decision, we are here to help you every step of the way!



Throughout the business life cycle each business needs constant vigilance to keep up with the business regulatory environment. Grant Thornton leads its market in providing assurance, taxation and advisory services specifically tailored to privately held businesses.

Our skilled advisors also provide reassurance to bankers and other regulatory bodies through the provision of financial reports and income tax services.

#### Services to the Business and Business Owner

- Strategic planning
- Structuring advice for the business and owner
- Finance/ banking reviews
- Tax planning
- Business profit improvement
- Asset protection planning
- Specialist business owner audits
- Remuneration planning
- Franchise services
- Owner affairs management
- Wealth investment management
- Succession planning
- Mergers and acquisitions
- Estate planning
- Retirement planning
- Superannuation advice
- Ongoing mentoring
- Specialist tax advice
- Accounting and compliance
- Business valuation
- Business health checks

### If you want to know more, please contact us...

#### Adelaide

Level 1  
67 Greenhill Road  
Wayville SA 5034  
T 08 8372 6666  
F 08 8372 6677  
E [info@gttsa.com.au](mailto:info@gttsa.com.au)

#### Melbourne

Level 2  
215 Spring Street  
Melbourne VIC 3000  
T 03 8663 6000  
F 03 8663 6333  
E [info@grantthorntonvic.com.au](mailto:info@grantthorntonvic.com.au)

#### Sydney

Level 17  
383 Kent Street  
Sydney NSW 2000  
T 02 8297 2400  
F 02 9299 4445  
E [newsletters.nsw@grantthornton.com.au](mailto:newsletters.nsw@grantthornton.com.au)

#### Brisbane

Ground Floor  
Grant Thornton House  
King George Square  
102 Adelaide Street  
Brisbane QLD 4000  
T 07 3222 0200  
F 07 3222 0444  
E [newsletters.qld@grantthornton.com.au](mailto:newsletters.qld@grantthornton.com.au)

#### Perth

Level 1  
10 Kings Park Road  
West Perth WA 6005  
T 08 9480 2000  
F 08 9322 7787  
E [info@gtwa.com.au](mailto:info@gtwa.com.au)



Grant Thornton

[www.grantthornton.com.au](http://www.grantthornton.com.au)

Grant Thornton Australia Limited is a member firm within Grant Thornton International Ltd. Grant Thornton International Ltd and the member firms are not a worldwide partnership. Grant Thornton Australia Limited, together with its subsidiaries and related entities, delivers its services independently in Australia. Liability limited by a scheme approved under Professional Standards Legislation.