

# About Us

## INTELLISOLVE

### Financial Planners

About / Legal

MISSION STATEMENT: “To give a sustained boost to your personal and business; financial, retirement, taxation and property affairs”.

#### IDEAL CLIENTS:

- Professionals
- Small Business Owners
- Employees and Families of Those Above
- Anyone Willing To Embark Upon An Enjoyable Journey of Planning For and Working Towards A Better Life

Proudly unshackled and fiercely free thinking, Intellisolve has no great love for any particular bank, insurer, financial product manufacturer, property developer or any other person or firm within the spaces that it operates!

Being focused solely on helping you to accurately identify opportunities, threats and issues across a wide spectrum, Intellisolve will then empower you with the requisite blend of knowledge and incentive for you to make timely and astute business and personal decisions and to then get on with helping you to put those decisions into action.

In 1992, I, Gianfranco (Frank) Genovesi (Intellisolve’s principal), commenced as a self-employed financial planner to have subsequently helped around one thousand people to build and protect their wealth thus as to achieve or to move much closer to achieving their goals.

In 2005, I gained WA real estate industry sales qualifications also to have worked as both a buyers’ and sellers’ agent’s representative. I have buying and selling residential and commercial property experience in both private treaties and auctions.

From 2001 to the present and via an individually designed and ongoing immersion program, I invested in excess of 12,000 hours of my time (you could think of it along the lines of the sort of commitment as required to complete a bachelor’s degree and to follow it up with a PhD), in order to now demonstrate a unique expertise across a substantial array of applying the tax law to both personal and small business circumstances (often intertwined). This substantial body of experience in navigating a myriad of ATO administrative procedures further expanded to include gaining an outstanding understanding of taxpayer and ATO engagement and behaviour within the Administrative Appeals Tribunal and the courts on matters of objections to taxation assessments and private rulings. According to some, so broad and so strong is my documented and demonstrated knowledge of how to interpret and apply the tax law, that in November 2012, the Tax Practitioners

Board (TPB), approved my application to be a “Registered Tax Agent” (unrestricted), without having prior graduated with a diploma or typically a degree in accountancy, coupled with years of supervised work experience (i.e. the overwhelming pathway to gaining TPB registration). Of note, not even lawyers can achieve this feat without firstly passing a Board approved course in Australian taxation law.

Interestingly, in April 2013 amidst a case I was running, I had somewhat of a stouch with an ATO tax lawyer in front of Senior Member CR Walsh of the Administrative Appeals Tribunal and where the lawyer said to the Tribunal words to the effect I was not an expert in my field. Well that kind of “got up my nose” so I wrote to the TPB to inquire on its position of whether it was ok for me to say that I am such an expert and to have further supplied the Board with some prior blog posts in which I’d blown my own trumpet to that effect. On 06th May 2014, the TPB wrote back to me stating that my conduct in question had NOT breached the tax agent’s professional code of conduct (which requires a registered tax agent to act with honesty, integrity and competence and wherein those blogs I effectively stated that):

- (1) I was Australia’s sole trainer to the financial, legal and accounting professions in the above regard and;
- (2) The ATO had a problem with admitting the fact that I am Australia’s foremost expert in my field.

I am further humbled that unlike typical accountants and upon my direct enquiry, the TPB did not require me to complete a Board Approved Course in Australian commercial law to enable the renewal of my tax agent triennial registration.

As the gatekeeper to who may become and who may remain a registered tax agent and as a sister Commonwealth agency to the ATO with which it cooperates closely, in conclusion hereof, I take the opportunity to state my gratitude to the Tax Practitioners Board for its continued faith in my technical prowess and associated competence, practices and ethics.

### Frank Genovesi:

- Diploma Financial Services (Financial Planning), Cert IV Accounting
- ASIC RG146 SMSF accredited to advise upon and facilitate the establishment and ongoing administration of self-managed superannuation funds.
- Registered tax agent Nos. 26223000 (Gianfranco Genovesi) and 24756578 (Genovesi Enterprises Pty Ltd, T/As Intellisolve
- Tax (Financial Adviser), Registration No. 25421900 with the Tax Practitioners Board
- Fellow of the National Tax & Accountants’ Association Ltd (NTAAF), Membership No. 61871
- NTAA Public Accountant
- Member of the (NTAA+), as Stapled to NTAA Membership No. 61871.
- WA Registered Real Estate and Business Sales Representative No. 51176 for; Perth Property Solutions.
- ASIC Registered Agent No. 34341 (via Genovesi Enterprises Pty Ltd)
- Twenty-three years experience as a small business owner/operator

### VARIOUS CAPACITIES TO ACT

- **Property:** On behalf of Perth Property Solutions, I provide advice and services in relation to any requirement to hold, develop, sell or buy your home, your home business property, your residential or commercial investment property and or your business real property.

- **Financial Services:** Personally provided as Sub-Authorised Representative No. 285883 of Genovesi Enterprises Pty Ltd (ABN 93 074 529 589), trading as Intellisolve, Corporate Authorised Representative No. 288893 of CHPW Financial Pty Ltd (CHPW), AFSL NO. 280201.
- **Taxation & Accounting Services:** You may instruct Intellisolve to collect, classify and interpret your financial information and as registered tax agents, to further provide you with associated taxation compliance and or advisory functions. You may also be aware that financial advisers have been able to register with the Tax Practitioners Board since 01/07/2014 in order to give limited advice called “*Tax Financial Advice*” (i.e. in relation to a client’s affairs as considered solely within a financial planning context) and whilst this is certainly a step forward for that profession, it can fall significantly short of your dealing with financial advisers who are also fully registered tax agents (such as Intellisolve), thereby as unrestricted by the Tax Agent Services Act 2009 in respect of the type of tax agent services you can obtain (e.g. advice upon the most suitable business structure, preparation and lodgement of your personal and business, company, trust and smsf tax returns, BAS lodgements and PAYG Withholding, plus; in representing your dealings with the Commissioner of Taxation as may be required from time to time e.g. applications and objections on a range of matters such as assessments, private and class rulings, audit findings, Administrative Appeals Tribunal matters etc).
- **Small Business Services:** Intellisolve can register your small business for GST and or an ABN, assist with dealings with local councils to obtain development approvals to commence or vary a business and more. Furthermore as an ASIC Registered Agent, Intellisolve can also serve as your company’s registered office for purposes of liaison with ASIC, setting up companies and special purpose companies and more.