

# Paul Money Partners

## Tax Returns

### **Paul Money**

Paul is a Chartered Accountant specialising in Superannuation and Wealth Management, Strategic Business Services and is a Consultant in all elements of taxation.

He has a license to provide strategic superannuation advice to clients and is a member of SPAA, Australia's peak industry body and foremost authority on self-managed superannuation.

Paul has advised clients in self-managed superannuation funds for more than 30 years.

In July 2013, Paul resigned as the Chief Executive Officer and Director from DFK Benjamin King Money and established Paul Money Partners. Paul was a board member of DFK Australia and New Zealand during his tenure at DFK Benjamin King Money.

Paul Money Partners philosophy is Experience, Honesty, Integrity and Excellence and Paul has created his practice based on these principles.

### **Qualifications, Memberships and Licenses**

Bachelor of Commerce (University of Melbourne)

Fellow of Institute of Chartered Accountants since 1975

Chartered Tax Advisor and member of Tax Institute of Australia since 1987

Member of Superannuation Professionals of Australia (SPAA) since 2008

Registered Tax Agent

Registered Company Auditor

Registered SMSF Auditor

Licensed by Capstone Financial Services as an Authorised Representative

### **Community & Pro bono work**

Paul has had substantial involvement in sport over many years including Australian football, cricket and basketball. Paul and his family have had a lifelong association with Riverside Cricket Club, a major player in Diamond Valley Cricket. Paul has been the President, Treasurer, Junior Coach, Junior Coordinator, as well as playing for 35 years. Paul's son Liam, who works in the practice, is currently the President and Paul's three sons, brother and four nephews are all current players.

Paul is a supporter and major sponsor of Marcellin Old Boys Football Club. The club plays in VAFA and Paul's son Tim is the President, as well as former coach and player. Paul's other son Tom also coached there and all three of Paul's sons have been players there.

Paul also sponsors community organisations, such as Riverside Cricket Club and Greensborough Football Club.

## **Cameron Watson**

Cameron has been a Chartered Accountant for 25 years, specialising in business services, taxation and superannuation.

He started his career at Price Waterhouse where he worked for 4 years and has extensive experience as a Senior Manager, working at firms such as Mitchell Wilson and second tier firms such as RSM Bird Cameron.

Cameron became a Partner at Benjamin King Money in 1999 where he worked alongside Paul Money until late 2001.

He started his own practice, Watson & Co in April 2005, firstly located in West Melbourne and later moving to the current premises in Carlton in early 2013.

He joined Paul Money Partners as a principal in 2016.

Cameron is an enthusiastic supporter of golf, AFL and cricket and previously played with the University Blacks Football Club in the VAFA.

He has four children and is heavily involved in all of their activities. Cameron is the Treasurer of the Parkside Junior Football Club.

## **Liam Money**

As at July 2015, Liam had been involved in professional accounting for some 13 years. This included seven years at a second tier firm, two years at a medium size firm, where he started from an undergraduate junior accountant and worked his way to being a manager in Business Services and Taxation. Liam has worked with Cameron Watson at Watson & Co for some four years in a very senior role and has played a significant part in managing that practice with Cameron. At the same time, Liam has worked with Paul Money Partners for the past two years, at the premises shared with Watson & Co and on 1 July 2015, he formally joins the Paul Money Partners practice.

Liam has been a trusted adviser to many Clients over the past years and he has been very proactive in assisting them in matters of accounting and taxation, as well as providing guidance in banking arrangements and wealth management. Liam has substantial knowledge regarding property investments and has assisted Clients in a number of ways.

Liam has assisted many clients deal with the changing technology in accounting systems for small business and is an accredited Xero adviser. He has substantial experience in Xero and MYOB and has been proactive in helping Clients use the software efficiently.

Liam has substantial outside interests involved in football and cricket. He supports Essendon in the AFL and is a current player and the president of Riverside Cricket Club, one of the largest clubs in the Diamond Valley Cricket Association. Liam also keeps busy with his family, his wife Jo and young daughters Grace and Ellie, living locally to the Greensborough office.

## **Philip Money**

Philip has been working at Branagan & Associates for more than 40 years, over 30 years as a principal and as a sole practitioner for the past 8 years. This practice has been operating in Greensborough (and previously in Flinders Lane) for more than 60 years. Paul and Philip's late father, Ray, was a partner there for many years and worked with Philip for a significant period of time.

As at 1 July 2015, Philip is transitioning to retirement and has sold his interest in the Branagan's business to Paul and Liam. He will continue to work at the practice as a consultant and will be working with his Clients at the Greensborough office to ensure that their needs are met as they have been in the past.

Philip has been a keen sportsman and a well known figure in Diamond Valley sport. He has played football at Greensborough Football Club and has been a member of Rosanna Golf Club for many years. He continues to support the football and cricket clubs even though his playing days are behind him.

### **Overview**

*You can deal directly with a highly qualified and experienced team who will look after your best interests.*

You can deal directly with experienced principals who can advise on all superannuation, taxation and business services issues. You can expect high quality professional advice delivered promptly and efficiently and tailored specifically to meet your needs. We respond quickly to your enquiries and we seek to ensure that you have a relationship where there is trust and integrity at all times.