



Hotels

 Perks.

Integrated business services

Service you deserve

Being in hospitality, you'd know how crucial good service is. It can really make a huge difference to your business. The same can be said for the kind of service your accountant provides.

At Perks, we offer accounting and financial services tailored to suit your specific needs.

Our clients include some of the most successful hotels in South Australia. Drawing on our knowledge and expertise, we've helped many of them reach their full business potential. Instead of just doing the sums, we make sure everything adds up. This holistic approach is what really sets us apart from other accountants and is the kind of service you deserve.



Industry insight

As a hotelier, you probably know the hospitality industry inside out. But if your accountant doesn't know it as well, chances are your investment will struggle to reach its full potential. It takes a certain understanding to determine what financial decisions are best for your particular needs.

At Perks, we're experienced in servicing the hospitality industry. Thanks to our Hotel Specialisation, we understand the unique pressures and challenges hoteliers face. Coupling our industry insight with hands-on experience and technical knowledge, we'll give you the very best account-keeping and financial advice.

We mean business

When it comes to business services, we're experts in a number of key areas. They include Accounting and Business Advisory, Finance, Wealth Management, Personal Insurance and Audit.

Accounting and Business Advisory.

Not only do we have the technical expertise, we also understand the particular accounting issues relevant to your industry.

We'll draw upon this to provide you with thoughtful service, strategic advice and practical solutions, helping you build, manage and protect your business and personal wealth.

Also, it doesn't matter how complex or unusual the business challenge - at Perks we'll dive straight in and give you the best possible results.



Tax Effective Group Structure

By structuring your business the smart way, we'll give you access to the lowest income tax rates. You'll also have minimal or no capital gains tax, whilst ensuring maximum asset protection.

Effective Accounting Software File Management

We'll help you organise your chart of accounts so they're quick and easy to use, when evaluating the financial performance of your different profit centres.

Performance Analysis against Industry Benchmarks

It's a highly competitive industry, so it's wise to keep an eye on the competition. We'll take a look at your current performance against industry-accepted standards. And, where you may have fallen short, we'll help you reach and maintain an industry accepted standard.

Departmental Trading Analysis

Running a successful hotel requires an understanding of how each segment of your business (including bistro, bar, accommodation and gaming) is individually contributing to your overall performance and gross profit. We'll review and analyse each individual trading department, to uncover areas that need improvement. Plus determine which departments are performing well and can be leveraged off.

Profit Improvement Strategies

Improving your profits isn't a simple matter of cutting costs and raising prices. By reviewing each of your departments as an individual profit centre and analysing against industry accepted percentages, we'll develop strategies to correct areas not performing to industry standard. This in turn will enhance your bottom line profitability.

GST Compliance

We'll make sure you comply with all your reporting requirements, with a review of your accounting software.

Finding you money. (Not just counting it)

At Perks, we also help find funds for you.

You see, we don't consider ourselves as just accountants - but important partners in your business development and wealth creation.

So, if you're looking to build a new beer garden, give your sports bar the latest plasmas or perhaps purchase your next hotel, we can help.

Strategic Finance Solutions.

Perks Finance is an unbiased finance broker, which means we offer objective advice. And, we'll do this with your business needs, personal situation and future plans in mind.

We'll strategically protect your assets, minimise the amount of security you provide and maximise flexibility. All this while still maintaining the certainty you desire.

What's more, we'll provide you with the most competitive rates, terms and conditions while avoiding undesired penalties, fees and charges.

Take a load off.

Your dedicated Perks Finance advisor will conduct all the research needed to source the most competitive finance solutions for you. Plus undertake all the negotiations with your bank or finance company, as well as prepare your finance submissions.

Business Loans

From overdrafts to bank bills, long-term loans (or fully drawn advances) and business credit cards, our business loans will meet all your hotel's finance needs.

Refinancing

Things change. The finance you obtained five or ten years ago may not be the best choice for you today. We'll make sure you have the best rates and fees, the best service and a loan that works for you.

Leasing and Hire Purchase

Keeping up with the latest industry standards can be a costly exercise. So it's sometimes the better option to lease or hire purchase your business equipment. Talk to us about how.

Property and Home Loans

If you're looking to purchase your next hotel, or perhaps renovate and extend your existing - we'll help source the capital. And if you need a personal home loan, we'll help you with that too.

Finance Audit and Advice

We'll make sure your current banking and finance arrangements meet your current needs and evolve, as your business needs change.



Perks Finance is a Full Member of The Mortgage & Finance Association of Australia (MFAA), which binds us to the strict codes of practice and guidelines set out by the industry's peak representative body. Perks is a proud sponsor of the AHA of South Australia.

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The road ahead

It's a tough gig the hotel business. You work long and hard for your money. So it's important to have an accountant who's helping plan your future down the road.

That's why at Perks we work long and hard too, in order to make your money work for you and your family - for generations to come.

Comprehensive Wealth Management.

Whatever your life goals, we'll help you to achieve them through strategic financial advice and ongoing wealth management.

So if you want to protect what you've worked so hard to build, or if you're just looking forward to the day when you can sit back and enjoy a cold one, we can help you achieve this.



Perks Financial Management Pty Ltd is the holder of an Australian Financial Services Licence No. 236551.
Perks is a proud sponsor of the AHA of South Australia.

Integrated Financial Planning

We'll help you attain financial freedom and security through comprehensive financial advice and a sound and tailored financial strategy.

Investment Portfolio Management

Once your initial investments are in place, you won't be left to manage your investment portfolio alone. We'll administer and manage your portfolio and provide ongoing support and advice.

Superannuation Advice and Planning

One of the key investment vehicles to help fund your retirement is superannuation. We'll help you enjoy the fruits of your labour in retirement by proactively and strategically managing your super.

Asset Protection

You've worked hard to build your assets. We can help protect both your personal and business assets against the devastating risk of loss.

Retirement Planning

If you decide to pass the reins onto someone else, you'll need to plan your future. We'll make sure your income stream, (whether it's an allocated or lifetime pension or non-superannuation investment), is maximised to fund the rest of your days.

Estate Planning

It's an inevitable thing - death. So we'll help you ensure that your important assets pass to the people you want, in the way you want. And as tax effectively, simply and as quickly as possible.

Succession Planning

More than not, businesses fail to plan for the possibility of the sudden death or disablement of a partner or owner. We'll minimise the financial risk and vulnerability of your business with a business succession insurance plan.

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Managing risk

Considering changes are the rule rather than the exception in the hospitality industry, it's wise to expect the unexpected.

Our insurance solutions can provide you with financial protection against the uncertainty, the unforeseen, the undesired and even the "impossible".

Personal Insurance

To make sure you're fully protected, we'll help you cover off all the bases. It all boils down to having a well-structured risk management strategy, as follows:

- Have an accurate calculation of your protection needs
- Build an integrated protection plan
- Select and source the most suitable insurance solution, which adequately protects your wealth and best manages your identified risks
- And structure the ownership of the policy in the most tax-effective way.

If you'd like more information or advice on the following insurance solutions, we've got it on tap.

Personal Insurance

Business Insurance

Income Protection

Business Overhead Protection

Life Insurance

Key Person Insurance

Permanent Disability Insurance

Business Succession Planning

Trauma Insurance

Guarantor Protection

Family Protection

Employee Protection

Thanks for taking a moment to read about how we can help your business.

If you like what you've seen and read and want to find out more, I'm happy to pull up a chair with you anywhere - your place or ours.

So whatever your hotel business issues, give me a shout directly on 8273 9308 or email me at alee@perks.com.au

Cheers

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