

MEDICAL



Grow. Protect. Manage.

---



Drawing on our 30 years of experience in accounting and financial planning, Walshs are the leading specialists in the medical sector. We provide expert and strategic taxation, accounting and financial planning advice to doctors and dentists.

Our thorough understanding of the medical industry and the individual requirements of professionals – from interns to specialists – means we can provide tailored advice that is geared towards every stage of your career.

With all services under one roof, we offer our valued clients a range of services including:

- Tax and accounting
- Financial planning
- Business structuring and tax strategies
- Business management
- Wealth advice
- Superannuation and retirement planning
- Lending
- Insurance
- Estate planning
- Salary packaging
- Budgeting and cashflow
- Outsourced finance team for medical practices

We also offer access to financial strategies including investments and loans, developed specifically for and available only to medical and dental professionals.

## WHY WALSHS?

The Walshs Group is wholly owned and operated by partners of the firm. Our team of expert advisors have extensive experience in the industry and are focussed on providing hands-on management. We strive to assist clients to create financial independence in a professional, proactive and caring manner.

Walshs equip medical professionals and practices all over Australia and overseas with comprehensive and fully integrated plans that meet their specific needs. Over the years, we have provided thousands of doctors with thorough, efficient and streamlined financial management.

We are trusted by major medical associations and societies, including Queensland Orthopaedic Registrars Association, Royal Australasian College of Surgeons,

James Cook University Medical Students' Association, University of Queensland Medical Society and the Royal Australian College of General Practitioners, to provide educational content to professionals at every stage of their career.

## OUR APPROACH

By combining forward-thinking accounting and taxation with financial planning within the one practice, we provide a comprehensive service offering which works together to provide complete wealth and financial security to our clients.

Our streamlined approach allows us to collaborate on solutions, ensuring we are accommodating to all of your personal needs and efficiently delivering financial plans.

“

As a locum doctor and sole trader I trust the Walshs team completely with both my personal investments and my business affairs. For more than fifteen years they have expertly provided the most comprehensive advice for my specific situation and I know that my wealth is safe in their hands.

” **Dr Paul Stankovic**

“

Working with Walshs across both my private and business financial requirements has been a streamlined, straightforward process. I was immediately provided strategic advice for both my present circumstances and the future, and there was never any double handling. They have helped to make my relocation from Rockhampton to the Gold Coast a stress free and positive experience.

” **Dr Kristel Kemmerling**

“

At Walshs, I am able to quickly and easily access key staff members who provide sound and comprehensive advice. Communication is easy and I can be confident that I am receiving the best care and attention as a valued client.

” **Dr Alex Loo**

## ACCOUNTING AND TAX

Walshs provide a full range of accounting and taxation services that deliver timely, accurate and proactive solutions and consider all tax implications within the medical industry.

We pride ourselves on ensuring compliance alongside a range of extra, value-added services to enable you to manage risks and maximise the growth of your wealth.

Alongside general accounting and tax services we offer:

- Business structuring and tax strategies
- Bookkeeping and payroll
- Business management
- Monthly performance reporting
- Tax planning
- Superannuation compliance
- Corporate secretarial

## FINANCIAL PLANNING

Our financial planning team provides hands-on management as well as strategic advice, designed to meet short and long term goals. Walshs' financial advisors work in conjunction with Walshs' accountants to provide a comprehensive plan for your individual needs.

“ **Our aim is to understand your individual business and personal needs and work with you to grow, manage and protect your wealth.** ”

This combined and tailored approach provides clients with a full representation of the effects of our advice including any tax effects, as these can be a significant factor in the overall effectiveness of your plan. Our team have a thorough understanding of business structure as they relate to medical professionals and high net worth individuals.

### Transitioning into private practice

We have proudly supported a large number of clients as they transition into private practice, ensuring they have the right structure in place and are aware of how the change will impact them.

Our aim is to help make this transition into private practice as easy and seamless as possible, so you can focus on what you do best.

### Outsourced finance team for medical practices

We work with many private practices for a monthly capped fee to efficiently and cost-effectively manage all of their bookkeeping, payroll, finance and tax needs.

Given our strong working knowledge of medical practice management software, combined with our financial expertise, our experienced team is equipped to help grow client practices – minus the headache of staffing and ongoing administration.

Alongside our tax, compliance and accounting services, our financial planning services include:

- Superannuation and retirement planning
- Cash flow management
- Comprehensive personal insurance broking advice
- Investments including managed discretionary accounts and wholesale investment options
- Home and investment lending, including mortgage broking
- Salary packaging

Many of our clients in the medical industry appreciate our help with salary packaging. Not only can we set up your account, but we can manage it on an ongoing basis with our in-house dedicated team.

If you're seeking a fully integrated financial management firm, Walshs is here to grow, protect and manage your wealth.



WE PROUDLY PARTNER WITH



**Simon Farmer**

Managing Director & Founder  
Financial Planning  
simon@walshs.com.au



**Hugh Walsh**

Partner  
Accounting & Taxation  
hugh@walshs.com.au



**Matthew Gellweiler**

Partner  
Financial Planning  
matt@walshs.com.au



**Stewart Mcleod**

Partner  
Accounting & Taxation  
stewart@walshs.com.au



**Peter Hodgson**

Partner  
Financial Planning  
peter@walshs.com.au



**Kaitlin Brock**

Medical Accounting  
Specialist  
kaitlin@walshs.com.au



**Donna Sutherland**

Lending Manager  
Walshs Finance  
donna@walshs.com.au



**Kirby Jamieson**

Personal Risk Manager  
and Advisor  
kirby@walshs.com.au



 CALL 07 3221 5677

 EMAIL enquiries@walshs.com.au

 VISIT  
Level 14/127 Creek Street,  
Brisbane, QLD, 4000

 CLICK [walshs.com.au](http://walshs.com.au)

 POST  
GPO Box 12  
Brisbane, QLD, 4001

 [linkedin.com/company/walshs](https://www.linkedin.com/company/walshs)

 @walshspractice



 SCAN ME