

A close-up photograph of a person's hand holding a dark pencil, poised over a silver laptop keyboard. The hand is wearing a light-colored, ribbed sleeve. The background is a soft-focus white surface.

Platinum
ADVISORY

02 8644 0626

**TAX &
BUSINESS
ADVISORY**

TAILORED ACCOUNTING SOLUTIONS

ABOUT PLATINUM ADVISORY



Our Approach

Platinum Advisory is an accounting and taxation practice offering multiple services and referral networks. Our director has been practising for the last 10 years. A wealth of experience has been accumulated in providing leading compliance and advisory services to many businesses and individuals. Our experience has been focused on building construction, retail, pharmacy, professional services, investor, and commercial cleaning to name a few.

All businesses require the helping hand to guide them along the way to ensure wealth is attained and built for generations. We work closely with our clients and effectively form a partnership together by adding strength and confidence to your business needs.

We work with our clients to effectively form a partnership. This allows us to be involved with you each step of the way and assist in times of need. Our first step is to ensure all compliance items are automatically setup to occur with the use of software. Then once we have the basic's set up, we can use this information to make informed decisions about the future for growth and expansion, tax planning and outside opportunities.

Naturally, we are problem solvers and pride ourselves to assist when others cannot. Our interest is always doing what's best for the client to ensure trust is established.



2,137
Individuals



1,761
Companies



1,374
Trusts

DIRECTOR PROFILE



Yousef Barry is the principal of Platinum Advisory. He is a registered tax agent and a member of the Institute of Chartered Accountants Australia and New Zealand. He is committed to providing you with effective accounting and taxation services with his extensive experience with small to medium businesses.

Yousef's extensive knowledge and application developed over 15 years in financial services. His experience includes working for large corporations such as Deloitte Australia and Pitcher Partners (VIC and NSW). Yousef has been awarded several qualifications and memberships reflecting his commitment to the industry and more importantly, servicing all client's business and accounting needs.

Yousef's drive and passion were formed from a young age after being involved in all aspects of his successful family business and wealth management. Therefore, leveraging this involvement to apply to your business and investment needs.

Yousef Barry
Platinum Advisory Director

OUR SERVICES



Business Tax Advice & Consulting

Our services are designed to address the issues faced by our clients. Having Platinum Advisory will allow your personal wealth and your business needs met with Taxation Compliance, Management Reporting, Cashflow Analysis, Financial Reporting including audit facilitation, and regular planning meetings to suit your needs.

Our tax services include advice on income tax, capital gains tax, goods and services tax, Fringe Benefits Tax, Fuel Tax Credits, corporate structures, employment taxes (including payroll tax, superannuation and iCare) and specific tax planning for all types and tax payers.



Tax Return Preparation & Planning:

Looking to have you tax returns prepared by a qualified individual, look no further as we take the time, care and skill to ensure a maximum refund. Whether your a salary and wage earner or have multiple rental properties or investment portfolio. Our preparers can assist with all your return requirements.

Tax Returns preparation includes:

- No obligation consultation (30 mins)
- Tax Return Checklist to aid the information gathering
- Review of all occupation specific deductions
- Fixed fee service to ensure no surprises
- Tax planning feedback to consider for next years return



Bookkeeping

We understand that monthly and quarterly compliance may be overwhelming. At Platinum Advisory we deploy leading cloud solutions to assist with compliance. Whether you're game to complete yourself or have our staff prepare your files.

Talk to us to have this set up correctly the first time



Self Managed Superannuation:

Self Managed Superannuation Funds (SMSF) is considered a flexible investment vehicle to secure financial freedom at retirement. Platinum Advisory is licensed to give certain advice regarding your superannuation. We can provide the following services in relation to SMSF's

- Accounting
- SMSF annual return report
- Audit (via third party)
- Member reporting
- Taxation strategies
- Contribution strategies
- Member benefit roll-overs
- Estate planning



Asset Protection & Structural Planning:

Using the experience and knowledge we have gained over the years we are able to work with our clients to structure their assets to ensure they are maintained not only for the present day but also for future generations. Advice can also be given for Will and Estate Planning.

WHY USE PLATINUM ADVISORY?



Experienced Advisors

Our extensive experience will give you confidence in tackling your business needs. Our director has been practising for the last 10 years. A wealth of experience has been accumulated in providing leading compliance and advisory services to a large number of businesses and individuals.



The Ability to Stay One Step Ahead

Let us take care of the process of managing the lodgements, reporting and business records, while you manage your business.



Knowledge That Can Serve Your Needs

All businesses require a helping hand to guide them along the way to ensure wealth is attained and built for generations. We work closely with our clients and effectively form a partnership together by adding strength and confidence to your business needs.

Platinum Advisory is a multidisciplinary taxation and accounting firm. Our principal, Yousef Barry, has been dealing with tax matters for ten years with Platinum Advisory operating for two and a half with a broad client portfolio including industries such as professional services, pharmaceuticals, commercial, investment, construction, retail and more. In addition to tax consulting and accounting, we also advise on financial and management reporting and cash flow analysis.

FIXED FEE SERVICES

Convenient, predictable pricing: We offer a customised client plan and fixed monthly consulting and accounting fees, so there'll be no hidden expenses or financial surprises impacting your budget. You can also count on the same capable and consistent monthly support from us regardless of unforeseen events or circumstances.

FULL SERVICE PACKAGES	Starter From \$250 p/m	Established From \$500 p/m	Platinum From \$999 p/m	Freedom P.O.A.
Turnover Limited	\$200k	\$1,000,000	\$3,000,000	Unlimited
ATO Compliance & Tax Reduction	BAS & Tax	BAS & Tax	BAS & Tax	BAS & Tax
Goal Setting & Trading Review	Annual	Half Yearly	Quarterly	Monthly
Personal Support (9am-5pm Weekdays)	Email	Email	Phone & Email	Phone & Email
Tax Planning & Proactive Advice	Simple	Simple	Complex	Complex
Bookkeeping for Bank Accounts	Single Account	Two Accounts	Unlimited	Unlimited
Staff Payroll Management	Annual	Annual	Weekly	Weekly
Employee Superannuation Processing	Reminders	Quarterly	Quarterly	Quarterly

Our Packages are created to suit your business and budget needs
Let us remove the hassle and provide stability.



Tax agent
25948583



CHARTERED ACCOUNTANTS
AUSTRALIA + NEW ZEALAND

All fees are GST Exclusive. Fees paid in advance via direct debit each month. Platinum Advisory reserves the right to amend fees. Any changes to fees will be notified via correspondence. Any fees quoted are based on information provided by you. If you omit any information then additional fees or package upgrades will apply retrospectively. All work is covered by engagement letter outlining responsibilities of clients and Platinum Advisory. * Individual Tax Return(s) included only cover the directors or associates of business to include one income source * ATO Correspondence Management refers to receiving all ATO mail to file and advise of any correspondence only. Fair use policy applies for unlimited support and only relates to direct clients.

TESTIMONIALS

 5.0 

I have been working with Platinum for a while now and have found them to be great to work with. My tax was a mess prior to Platinum taking over. Couldn't speak highly enough of them.
samd781

I have been working with Platinum for the past 12 months and I can not fault this company. The services that they provide is amazing always on point. You always find a way to get it done – and done well! Keep up the great work.
alia235

Fantastic service and professional management. Very informative and knowledgeable about how to operate my business. More than satisfied. Honest, well informed and very punctual with getting back to me.
amandaj930

The team at Platinum Advisory Accountants and Advisors is truly deserving of a 5-star rating. For all your accounting and business growth needs, platinum advisory provides outstanding services that are professional.
leannea84

Very happy with the service provided by platinum advisory. Loved dealing with the team. The primary accountant provided me with great advise about setting up my business and Family trust. He was also very knowledgeable about SMSFs. I highly recommend their services. Very friendly and reliable.
victory-deli-catering



CONTACT PLATINUM ADVISORY

- **PHONE**

02 86 440 626

- **EMAIL**

info@platinumadvisory.com.au

- **ADDRESS**

Office 7, Suite 9, Level 2
1-17 Elsie Street
Burwood NSW 2134

- **Website**

platinumadvisory.com.au

