



Business Builder



Strategies, mentoring
and action plans
to boost your business

Business Growth - Accounting & Taxation - Wealth Creation - Loans & Leasing

Welcome to Business Builder

Do you sometimes feel like your business is caught in the past, treading water in the present, and you're uncertain about the future? Are you looking for a clear direction and the tools to make it happen? Do you want to attract new staff and/or keep your current employees stable?

BMO's business builder program is designed to provide strategies, mentoring and action plans to help you strengthen your business and provide you and your employees security for the future.

The program is available for any business. However, if your business has 10 or more full time (or equivalent) employees, and you are located in a key region or industry, then you may have access under the Government's Jobs Assist program, for up to \$8,000 of funding to allow us to undertake this program – at no cost to you.

JobsAssist, being rolled out by the Department of Employment, Economic Development and Innovation (DEEDI) offers a staged approach to support businesses through tough times and keep your workforce strong.

The great thing about the BMO Business Builder program is that it is not a 'one-size-fits-all' approach. BMO's professional team offers you direct, practical help that is tailored to your business.



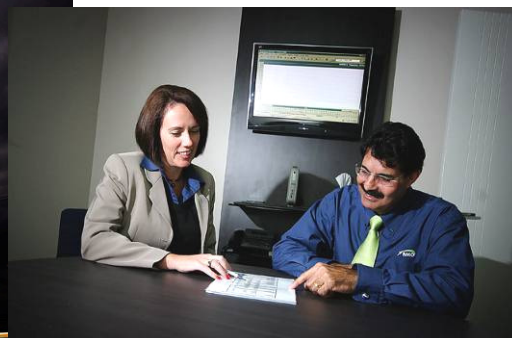
Our approach

The program is delivered in two stages:

Stage 1 – We conduct a full assessment of your business – looking at the strength's weaknesses, opportunities and threats of your business incorporating a review of your business planning, leadership and management, personnel, employee engagement, business processes, customer value proposition, sales, marketing and communications, financial assessment, wealth creation strategies, and legal status. Once this assessment is complete, we work with you to develop an action plan which sets out goals, priorities and plans for monitoring results.

Stage 2 – This is the implementation phase. We will provide coaching, mentoring, direct advice and support to put in place the plans and priorities identified in stage one.

This program offers tangible results and direct support. We look forward to working with you through the process.



Job Assist Program Outcomes

Stage 1 – Set the direction

- **Assessment is undertaken to:**
- **Identify weaknesses & issues impacting the business**
- **Identify business strengths & opportunities**
- **Develop action plan to improve business performance**



Stage 2 – Make it happen

- ✓ **Proposed outcomes include:**
- ✓ **Sustained business activity & employment levels**
- ✓ **Improve business knowledge & systems**
- ✓ **Improvement leadership, management and reporting**
- ✓ **Increased efficiency & productivity**

Your consultants

Russell Evans

Business Coaching / Strategy Development

Russell has a diverse range of experience having performed senior leadership and consulting roles for some of Australia's largest organisations.

He brings a wealth of experience in the area of starting and growing businesses and has demonstrated success at leading organisations through complex problems and change.

His special interest is in the area of strategy development and the development of pragmatic ways to achieve sustainable behavioural change aligned to the overall strategic direction of the business.

Peter McKinnon

Business Coaching / Financial Performance

Accounting is in Peter McKinnon's blood. Following in his (late) father's footsteps and armed with a Bachelor of Business (accounting), Peter spent several years as a commercial accountant and a sole practitioner, before launching what was to later become BMO Accountants in 1990.

With more than 26 years experience, Peter has developed a keen interest in business development and a passion for helping clients turn their businesses around.

Peter has spent most of his life in Dalby and is a highly respected member of the local community. He is a former Dalby Town Councillor and spent seven years as President of the Dalby Chamber of Commerce and Industry. In 2005, he was awarded Chamber of Commerce Life Membership in recognition for his significant contribution to the local business community and the betterment of Dalby. He is also a Fellow of CPA Australia (Australian Society of Certified Practising Accountants).

Adrian Rasmussen

Business Coaching / Financial Performance

Adrian's flare for maths at a young age led him pursue an accounting career where he has now clocked up over 20 years in practice. A quiet achiever, Adrian started out in an assistant's role at BMO in 1988, impressively progressing through the ranks to acquire his position as a partner at BMO ten years later in 1998.

He has a strong local heritage, having grown up at Brigalow (near Chinchilla) and an intimate understanding of business and primary production (as he runs his own lamb

fattening farm just west of Dalby) and a love of working with figures. His qualifications and experience are backed by his genuine care and concern for people.

Kelvin Tyler

Business Coaching / Financial Performance

Kelvin Tyler's down-to-earth and honest approach, backed by his high level of technical expertise, has earned him much respect among BMO clients and team. Kelvin's story is an inspiration to young people starting out in their careers. He began with BMO in 1993, working initially as a computer clerk before progressing to an Assistant Accountant position. In just a few years Kelvin achieved his Bachelor of Commerce and CPA status, and went on to make partner in 2003.

Born in the Dalby district and raised on a family farm, Kelvin continues to own and operate a sizeable grain property at Irvingdale with his brother. His hands-on role in the farm business, allows him to connect well with both farming and small business clients. He also keeps an active interest in BMO's computer and information technology systems.

Michelle McVeigh

Business Coaching / Financial Performance

Determination, high technical competence and empathy for clients are qualities that characterise Michelle McVeigh. After Michelle completed her Bachelor of Business (Accounting), she launched her career working for in accounting and finance in the cotton industry.

In 1994, Michelle joined BMO and went on to become a partner in 2008. She has extensive taxation and accounting experience, is a specialist in self managed super funds and has a strong interest in succession planning. At busy times in the office, her calm nature is reassuring to both clients and the BMO team. Michelle enjoys the challenge of helping clients and their families balance good business decisions with their personal goals.

Raised on the family farm at Jimbour, Michelle has always had a connection with the land. With husband Andrew, she now owns and operates a grain property near Macalister and is also kept busy with her two young sons, volunteering at school, supporting the local rugby union and tennis clubs and treasurer of the Dalby Dolphins Swimming Club.

David Briese**Business Coaching / Financial Performance**

With more than 20 years accounting experience, David is a highly respected member of the BMO team and was appointed Associate Partner in July 2009.

David started out with BMO in 1988 working his way to a senior accounting role and heading up the (former) Chinchilla office of BMO. In 1996, David went to work with a reputable accounting firm in Mackay. Eight years later, David made a lifestyle choice to move back to Dalby, and was eagerly welcomed back to BMO in 2004. Having grown up on a cattle and dairy property, David is well connected to both rural and business clients and enjoys the challenge of working through complicated accounting and taxation issues.

Shane Lee**Financial Planning and Wealth Creation Strategies**

Shane is a Certified Financial Planner with 20 years experience in banking and finance backed by a Bachelor Commerce and a Diploma of Financial Planning.

After nine years in the banking sector, where he'd advanced quickly from teller to branch manager, Shane moved into a career in Financial Planning with a large accounting firm. In 2002, he joined BMO where he helped established the financial planning arm - a natural extension of the accounting business - and become a Director of BMO Financial Services.

Shane provides a range of services including wealth creation strategies, investment planning, budgeting, income protection and life insurance. His conscientious approach is valued by clients, and advice is always tailored to each individual's circumstances.

Barry Jordan**Human resources / policies and procedures / management strategies**

With more than 20 years in the finance industry and qualifications in both management and human resources, Barry Jordan offers client a wide range of business advice.

With his highly efficient management style, Barry oversees the operational management of BMO including administration, human resources, compliance, workplace health and safety, performance management, customer service, and information technology.

He joined BMO in 2004 and has a strong interest in keeping the team motivated and manages all BMO training and information technology.

Megan James**Communications and Marketing Strategy**

Megan joined BMO in 2007 to manage BMO's marketing and communications activities.

After growing up in Dalby, Megan completed her Bachelor of Business, and went on to spend more than 12 years in Brisbane and Newcastle working in public relations and communications roles in a range of industries. Megan moved back to Dalby in 2004 so that she and her husband could join the family farming enterprise.

Megan works with clients to develop communications strategies including branding, newsletters, promotional material, advertising and websites. She also enjoys facilitating clients' brainstorming or strategic planning sessions. She is currently holds a position on the management committee of the Dalby Chamber of Commerce and Industry and is editor of the Chamber's popular @Dalby Magazine.

Krista Hauritz**Communications and Marketing Strategy**

Krista joined the BMO team in early 2010. Krista brings with her over 20 years experience in the tourism industry, including experience in Japan and the USA. Her most recent roles were as Regional Director, Tourism Qld and General Manager for Toowoomba and Golden West Tourism.

She is a recipient of North Qld and Qld Tourism Awards, a finalist in the Australian Tourism Awards and is featured in the Who's Who of Australian Women and Who's Who of Queensland publications. Born in Toowoomba, she has a Bachelor of Business (Tourism).

Krista currently works with clients on business development strategies, namely in relation to yield development, grant applications, marketing and communications.