

BlueRock 

Better Business. Better Life.

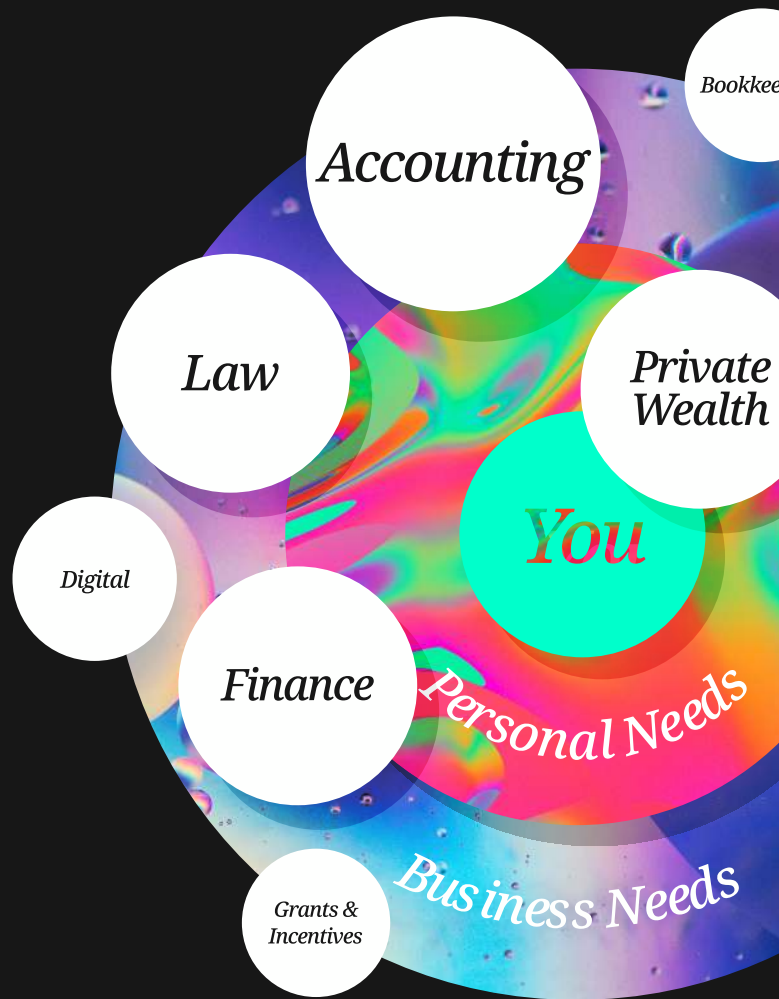
An entrepreneurial one-stop-shop for growing minds and businesses



BlueRock

BlueRock is a multidisciplinary entrepreneurial advisory firm that helps people to operate and grow successful businesses and achieve their personal goals.

BlueRock's growth is supported through the investment of Everything is Awesome Ltd (EIA), a holding company that invests in a community of entrepreneurial businesses who work to succeed and add social value to our community.



“ You live, we business ”



BlueRock's growth is supported through the investment of Everything is Awesome Ltd (EIA), a holding company that invests in a community of entrepreneurial businesses who work to succeed and add social value to our community.

EIA is a founder-led investment company that is equipped to harness, foster and guide entrepreneurs to achieve exceptional results by building out the community and resources around them.

Over the years, EIA has invested in a number of successful businesses across a range of industries and is currently going through an active investment strategy. The combination of BlueRock business advisory and EIA capital investment has created a true investment and advisory business.

Working With BlueRock Means Joining a Community

While we place a strong commercial lens on everything we do, at our heart we're a B Corporation that defines our success through the positive impact we have across our team, clients, suppliers, community, and the environment.

Being a B Corporation requires BlueRock to go through a rigid certification process every three years, but this is an important aspect of our culture that we are committed to, as a business. It provides us with a best-practice framework to have the biggest community impact.

We also run our own philanthropic foundation, the Be BlueRock Foundation, which provides a platform for staff and clients to contribute to local charities and causes close to their hearts.

Certified



Corporation[®]

**Be
BlueRock**
FOUNDATION

“ *Inspiring
Philanthropy to Build
Strong Communities* ”

BlueRock established the Be BlueRock Foundation to give individuals and organisations a simple, cost-effective and tax-effective way to establish their own sub-fund with the support of a broader foundation, so they can get involved in philanthropy and distribute funds to charities of their choice over time.

The Be BlueRock Foundation is a Public Ancillary Fund, which is a type of charitable trust in which an individual, family, organisation or company can establish a fund to put aside money for long-term charitable purposes. It allows people to enjoy the benefits of a public foundation without the responsibilities of being a trustee.

BlueRock is responsible for the administrative, investment, legal, taxation, audit, reporting and compliance requirements of being a trustee which leaves our clients and staff free to think about the charities and causes they would like to support.

Our BlueRock employees get involved through fundraising, volunteering, and pro bono work, as well as having input into the causes and charities we support.

bebluerockfoundation.org

BlueRock's Multidisciplinary Services

Accounting

BlueRock's accountants take compliance and reporting up a notch to create a true partnership. We act as your advisory team, meeting with you regularly to maintain proactivity and strategically drive your business forward.

Self-Managed Super Funds

Superannuation offers amazing opportunities for long-term wealth accumulation. Our SMSF specialists work closely with your accountants and finance team to plan and consolidate your financial future.

Private Wealth

Mapping out a clear financial future needs a team approach. So our financial planners, lawyers and accountants collaborate on a smart strategy to help you accumulate wealth, protect your loved ones and meet your life goals.

Law

Our industry experience and best-practice approach to law makes setting up a business easy. Our specialised team guides you through complex legal issues without unexpected costs, so you can grow your business with confidence.

Bookkeeping

Our dedicated bookkeeping team takes care of the day-to-day record keeping involved in running a successful business. We deliver accurate and timely data and reports through cloud technology, so you can make the best business decisions with the right information.

Digital

Our Digital team harnesses the power of digital to drive meaningful growth and efficiencies for businesses. Our end-to-end service means we specialise in everything from digital strategy and optimisation through to web and app development, systems consulting, brand and marketing.

Finance

From home loans to large-scale development funding, BlueRock Finance aims to make the impossible possible. We secure the right finance to bring your dreams to life and support you every step of the way.

General Insurance

If you're in business then you most likely own assets – and that means risk. We seek out the best value insurance for your franchise properties, contents, vehicles and equipment, and tackle difficult claims for you.

Grants & Incentives

We're experts when it comes to the Australian Government's tax incentives. If your company wants to do research and development, exporting or another grant-supported activity, we can help you recover a generous slice of the expenses while remaining compliant.

Health

With teams of business advisors experienced in a number of key industry verticals, we are well-placed to deliver cost-effective, efficient and holistic services across every aspect of your business operations.

International

BlueRock International offers specialised tax, business advisory and legal services for high-growth businesses or individuals operating in a global market. We help you achieve your international growth goals and empower you to make commercial decisions by applying our technical expertise across multiple disciplines.

Employ

Payroll covers so much more than a list of people you employ and what they're paid. To avoid risk, your payroll process should include tax considerations, employee entitlements and legal compliance – and that's when things can get tricky. Plug in an experienced employment team to streamline operations and support happy staff.

An Entrepreneurial One-Stop-Shop For Growing Minds And Businesses

Our multidisciplinary framework means we provide a one-stop-shop for individuals wanting to grow a successful business and build private wealth.

With many years of experience in the world of entrepreneurship and a wide professional services community, we are well-placed to support you with holistic, tailored and innovative growth strategies that complement your goals.

BlueRock clients have an experienced team of specialists in their back pocket to call or bounce ideas off, giving them the confidence and freedom to strive high.

We specialise in several industries, including franchising and retail, manufacturing, property and construction, start-ups, pharmaceutical and health, digital and tech, and professional services.



One thing I have appreciated about BlueRock is the wide range of services they provide. Whether it's digital or accounting, they have supported us as a hospitality business; through how we structure our finances and looking at the digital platform we have to enable the businesses I've worked with to function well. **They're a great team to work with and I highly recommend them!**



BRENTON HOWIE
Schnitz

BlueRock Accounting








Why Choose BlueRock Accounting?

BlueRock Accounting offers entrepreneurial expertise and innovative technology that puts businesses ahead of the pack.

Our business accounting and advisory solutions drive growth and profit to help people meet their goals and have a great life!

We always look for better and different ways of doing things. We leverage cloud-based software and integrated reporting systems to provide confidence in the numbers and deliver insightful data, so business owners can make great business decisions.

We work closely with BlueRock's other divisions to provide the following holistic and strategic services that result in the best outcomes for Aussie businesses:


-  Business advisory
-  Specialist and international tax
-  Business accounting and tax
-  Government grants and incentives
-  Cash flow management
-  Corporate advisory and capital raising
-  Cloud accounting and analytics



Get in touch with a BlueRock Accountant.

Trevor Gordijn

*Chief Commercial Officer,
BlueRock and Managing Director,
BlueRock Accounting*

 +61 4 0395 5563

 trevor.gordijn@thebluerock.com.au

BlueRock

Bookkeeping


Why Choose BlueRock Bookkeeping?

It's essential that business owners get bookkeeping right if they're to make sound business decisions based on timely and accurate information.

So it makes sense to bring in a dedicated bookkeeping team who can manage the day-to-day record keeping with their eyes closed while you keep your eyes on the prize.

Whether you're a business owner or a bookkeeper, we make life easier by customising your monthly bookkeeping services according to your business size and needs.

Our BlueRock bookkeeping team assists businesses of all sizes from many different industries. Our only requirement is that you're looking for bookkeeping efficiency across one or many of the following service areas:


-  Monthly bookkeeping
-  Payroll services
-  Xero conversions
-  Xero health checks
-  Bookkeeping catch-up
-  Xero training



Get in touch with a BlueRock Bookkeeper.

Olympia Lombardi

*Client Onboarding Specialist,
BlueRock Bookkeeping*

 +61 4 1346 2018

 olympia.lombardi@thebluerock.com.au

BlueRock

SMSF

Why Choose BlueRock SMSF?

BlueRock's SMSF division combines the experience and knowledge of our financial planning and investment team with that of our accounting and compliance experts to give you the best holistic advice on all things superannuation.

We work closely with the whole BlueRock community to provide the following SMSF-related services that are carefully considered as part of a complete wealth strategy:

- ✓ Goals-based, comprehensive advice on your superannuation fund
- ✓ Advice on SMSF contributions & pensions
- ✓ Advice on direct investment opportunities only accessible via an SMSF
- ✓ Frequent reviews of your investment strategies
- ✓ Comprehensive SMSF investment and wealth accumulation strategies
- ✓ Estate planning specific to your SMSF needs
- ✓ SMSF tax planning
- ✓ Advice on property acquisition

Fixed-Fee SMSF Compliance


We also provide great value for money with our fixed-fee SMSF compliance package:

- ✓ Live data updates and monthly reconciliations
- ✓ Regular contribution and pension updates
- ✓ Independent SMSF audits
- ✓ Annual financial statements
- ✓ Guidance on superannuation law
- ✓ Easy access to your fund's portfolio via our online portal
- ✓ Annual tax returns and lodgement
- ✓ ATO compliance obligations
- ✓ An actuarial certificate (if required)
- ✓ A dedicated SMSF specialist accountant you can talk to

Get in touch with a BlueRock SMSF specialist.

George Karavias

Director, BlueRock SMSF

 +61 4 0320 6413

 george.karavias@thebluerock.com.au



BlueRock

Private Wealth








Why Choose BlueRock Private Wealth?

BlueRock Private Wealth is an experienced team of certified financial advisors and private wealth specialists who believe that it's absolutely vital to have a Plan B in life, but that Plan A is where the magic happens.

Through effective financial planning and tailored investment strategies, BlueRock's Private Wealth team ensures a strong foundation and clear roadmap to reach short-term milestones and long-term goals.

Our service offering can be tailored for those starting their wealth journey, right through to comprehensive Family Office structuring and governance. The fundamentals remain the same irrespective of the magnitude of your wealth.

BlueRock's Private Wealth team works closely with other areas of BlueRock to provide holistic advice and execution across the following services:


-  Goals-based strategic financial advice
-  Personal cash flow and forecasting, analysis & tracking
-  SMSF property advice and strategy
-  Life insurance
-  Estate planning
-  Superannuation
-  Investment advice



Get in touch with a BlueRock Private Wealth specialist.

Adam Morse

*Managing Director,
BlueRock Private Wealth*

 +61 4 8116 0336

 adam.morse@thebluerock.com.au



BlueRock

Law

Why Choose BlueRock Law?

Our legal eagles in the BlueRock Law team have a wealth of experience across all aspects of personal, business and commercial law.

Our multidisciplinary approach, combined with innovative digital technologies, allows us to deliver quick turnaround times, consistent high-quality advice, measurable results and outstanding value.

Our in-depth knowledge of business acquisitions and divestments, private capital raisings and joint ventures, and restructures and investments means we understand how to get the best commercial outcomes for you and your business.

BlueRock Law works closely with the BlueRock community to provide advice and expertise across the following service pillars:

- ✓ Commercial law
- ✓ Mergers and acquisitions
- ✓ Property law
- ✓ Employment law
- ✓ Litigation and insolvency
- ✓ Wills and estate planning
- ✓ Franchising



Get in touch with a BlueRock Law specialist.

Bruce McFarlane

CEO, BlueRock and Managing Director, BlueRock Law

 +61 4 0220 5878

 bruce.mcfarlane@thebluerock.com.au







BlueRock Digital

Why Choose BlueRock Digital?

BlueRock Digital is BlueRock's digital agency and consultancy that specialises in intelligent digital strategy, development, systems consulting, design and marketing.

The BlueRock Digital team is one of the only digital providers in Australia that can truly drive meaningful growth and efficiency for businesses across back-of-house operations and front-of-house customer experience. From start-ups to large brands, the Digital team partners with Australian businesses to help them reach their goals and have an impact.

Grow Your Business

-  Brand and content
-  Websites and eCommerce
-  Paid media advertising
-  Marketing optimisation


Improve Your Operations

-  Digital transformation
-  Business systems and automation
-  Software development and integrations
-  Business intelligence and reporting

Get in touch with a BlueRock Digital specialist.

Simon Brosolo

*Managing Director,
BlueRock Digital*

 +61 4 2212 3846

 simon.brosolo@thebluerock.com.au



BlueRock Finance

Why Choose BlueRock Finance?

When it comes to financing your business or personal goals, our primary focus is to reduce your stress, improve your growth potential and help you to be successful in your aspirations.

Our finance services are not aligned with any particular provider – it's about getting the absolute best advice and solutions available in the market for you.

When you work with BlueRock Finance you get access to a responsive team of experienced loan consultants who complete the full loan application paperwork on your behalf, leveraging relationships with over 20 commercial and asset finance lenders, over 35 home loan providers, plus private banks and fintech/online financiers. We also provide ongoing support to ensure your loan continues to be competitive in the future.

We provide the following finance services:


- ✓ Home loans
- ✓ Business loans
- ✓ Asset finance
- ✓ Cash flow solutions
- ✓ SMSF loans
- ✓ Property, construction and development loans



Get in touch with a BlueRock Finance specialist.

Jamie King

*Managing Director,
BlueRock Finance*

 +61 4 3872 6933

 jamie.king@thebluerock.com.au



BlueRock

General Insurance

Why Choose BlueRock General Insurance?

If you own property, stock, vehicles, goods in transit or equipment, you need insurance. Ditto to protect yourself from litigation defence costs, financial loss, data exposure, media liabilities, and even fines and penalties.

These are the scary aspects of running a business that we can sort out for you quickly and confidently.

BlueRock's awesome team of insurance advisors often identifies areas of exposure you're not aware of, which prevents nasty surprises and unexpected costs. And we offer full peace of mind, knowing that the information we collect and the data we store not only meets but exceeds industry standards.

BlueRock's General Insurance team works with business owners and individuals to get you the best insurance solution in the following ways:

Business Insurance

You can't predict the future but you can protect it. Business insurance is essential for protecting your business and your livelihood from the financial consequences of a potential mishap that could easily wipe out your assets, damage your brand or end up in litigation.

The experience and depth of knowledge of our BlueRock business insurance advisors means we will find the best coverage for your business to ensure you're properly protected. We work with clients from all industries, ranging from sole traders to multinational brands, and are confident we can find the right business insurance solution for you.

Domestic Insurance


The value of appropriate and adequate insurance is often realised too late. You don't think it will happen to you...until it does. And often people are surprised to find they're under-insured or ill-informed. While most people do cover their significant assets, it's easy to under-estimate the full replacement cost of these items and still be out of pocket when your claim is paid out. The cost of dinnerware, jewellery, fine arts and shoes can really add up!

Our insurance team works closely with you to make sure you have the right cover at the best price. We partner with a range of providers to offer the best solutions when it comes to your home and contents, investment property, strata, car, motorbike or boat.

Get in touch with a BlueRock General Insurance specialist.

Adam Gibbins

*Director,
BlueRock General Insurance*

 +61 4 0205 0557

 adam.gibbins@thebluerock.com.au



BlueRock

Grant & Incentives

Why Choose BlueRock Grants & Incentives?

Hundreds of Australian and state government grants and incentives are there to help businesses get set-up, grow and prosper, but they're not always easy to access.

Irrespective of your industry or aspirations, we believe that every business leader should be aware of the grants and incentives available to them, and have the support to understand eligibility and submit quality applications.

BlueRock's Grants & Incentives team is at the forefront of available business funding and works closely with other areas of BlueRock to provide holistic advice and execution across the following areas:

R&D Tax Incentive

Did you know the Australian Government offers incentives to Australian businesses doing research and development (R&D)? The R&D Tax Incentive program provides eligible businesses with tax offsets for the costs involved in advancing your innovation.

Export Market Development Grant (EMDG)

The grant that helps Aussies take on the world! You can spend up large when establishing your overseas customer base for exports, but the EMDG is here to refund a decent slice of that loaf, allowing you to make like Vegemite and spread across the globe!

Early Stage Innovation Company (ESIC)

Reaching for the stars and looking for investment to fund your future? ESIC is a tax incentive with massive benefits for your investors, encouraging others to get on board before your business blasts off like a rocket.


Other Grants

There are hundreds of grants made available for Australian businesses to claim each year. Think your project might stand out from the crowd? Our advisors can find the best grants for you to target and assist in putting your best foot forward to nail that application, then manage the extra duties once the cash comes in.

Get in touch with a BlueRock Grants & Incentives specialist.

Tom Moore

*Senior R&D Consultant,
BlueRock Accounting*

 +61 4 1713 6604

 tom.moore@thebluerock.com.au



BlueRock

Health

Why Choose BlueRock Health?

BlueRock's multidisciplinary model means we provide a one-stop-shop for business owners looking to manage and grow successful businesses within the health sector.

With a team of business advisors experienced in several key industry verticals, we are well-placed to deliver cost-effective, efficient and innovative advice on every aspect of your operation.

BlueRock's Health team takes care of your daily operational needs with the benefit of having a whole team of professionals working holistically to get the job done. We bring deep knowledge and experience across a range of industries to the following service areas:

- ✓ Financial reporting and bookkeeping
- ✓ Tax compliance and accounting
- ✓ Industry-specific consultancy and advisory
- ✓ Legal support and compliance
- ✓ Digital automation and growth



Get in touch with a BlueRock Health specialist.

Shaun Langdon
Managing Director, Health

 +61 4 1392 2625

 shaun.langdon@thebluerock.com.au



BlueRock International

Why Choose BlueRock International?

Life and business overseas brings unique and intricate challenges and compliance requirements that distract you from, well...life and business!

Whether you're setting up in Australia, expanding overseas, or moving to – or from – Australia, you can rely on our international specialists to provide strategic and reliable advice to help you achieve your global ambitions.


BlueRock International offers specialised tax, business advisory and legal services for high-growth businesses or individuals operating in a global market. We help you to achieve your international growth goals and empower you to make commercial decisions by applying our technical expertise across the following disciplines:

- ✓ International tax advisory & compliance
- ✓ International mergers & acquisitions
- ✓ International business growth & strategy
- ✓ International legal services
- ✓ Australian grants & incentives
- ✓ Virtual financial services

Get in touch with a BlueRock International specialist.

Mark Fancellu

Director, BlueRock Accounting

 +61 4 3805 7881

 mark.fancellu@thebluerock.com.au



BlueRock Employ

Why Choose BlueRock Employ?

Our experienced BlueRock Employ experts make sure your payroll process is efficient, accurate and compliant, so you can enjoy streamlined operations and happy staff.

Regardless of your industry, business type or size, you've no doubt discovered that it's people that determine your ultimate success. If you pick the right people to ride the bus with you, you'll reach an incredible destination together...and have a great time along the way.

But as you grow and business becomes more complex, payroll and employee management become time consuming and risky. There are tax, award rates, and other legal entitlements to consider, and many reporting and compliance obligations that come with employing staff.

Working with BlueRock gives you access to detailed knowledge and advice to make sure you're compliant with the national regulations and are set up to navigate the maze of wage categories and awards, including:

- ✓ Setting up new employees
- ✓ Filing weekly, fortnightly or monthly payroll information with Single Touch Payroll (including pay reports and pay slips)
- ✓ Managing employee leave entitlements and pay queries
- ✓ Making superannuation contributions
- ✓ Lodging monthly and annual payroll tax reports
- ✓ Reporting your company's remuneration to the relevant workers compensation authority
- ✓ Managing the annual payroll summary reporting with the ATO
- ✓ Providing advice on wage costs and legislative changes
- ✓ Handling all other pay-related matters on your behalf


On top of our usual payroll services, we are also able to audit your payroll process and provide advice on complex employee issues


- ✓ Get advice on whether you're paying in line with your relevant modern award(s)
- ✓ Access professional knowledge about what to pay staff
- ✓ Better understand your employee contract(s) and whether you need to make updates

Get in touch with a BlueRock payroll specialist.

Michael Crawshay

Director, BlueRock Employ

 03 8658 2052

 michael.crawshay@thebluerock.com.au





*Want a team of
experienced entrepreneurs
in your back pocket?*

Our experienced entrepreneurial advisory team can help you navigate a successful path to growth and success with our multidisciplinary service offering.

Please get in touch to talk through your needs and goals.

bluerock.com.au