FOR ACCOUNTANTS AND PROFESSIONAL PARTNERS

Working alongside you when a client's business is under pressure

Eventum Optimum is a pre-insolvency and restructure advisory firm. When a client is facing ATO debt, creditor pressure or the need to restructure, we work in partnership with you, as their trusted adviser, to assess the position, set out the options available and coordinate the specialists required.

You remain your client's primary adviser throughout. Our role is to add specialist support and keep you informed at every stage, so that together we can pursue the best available result for your client.

Our services

Pre-insolvency and restructure advisory

Assessment of the client's position and the restructuring pathways available, coordinated with registered practitioners where a formal process is required.

Pre-SBR preparation and financial readiness

Preparing records, lodgements and financial information ahead of a Small Business Restructuring process.

Asset protection and Family Protection Trusts

Structuring of Family Protection Trusts, with documentation prepared by our legal partner.

Mortgage and PPSR registration and discharge

Including ALLPAAP and PMSI registrations. Mortgage documentation is arranged through our legal partner.

Trust administration and compliance

Ongoing administration and compliance support once a structure is in place.

Complex ATO matters

ATO debt support, Director Penalty Notice exposure analysis and garnishee responses, in conjunction with Naked Accounting as registered tax agent.

Safe harbour plans

Plans to support directors in documenting a course of action under the safe harbour provisions. Directors should obtain independent legal advice.

Loan and security agreements

Loan and security documentation for trust and related-party arrangements, arranged through our legal partner.

Trust deed stamping

Arranging stamping of trust deeds with the relevant state revenue office.

How we work with you

1

Initial conversation

Contact us to discuss your client's circumstances on a confidential, no-obligation basis.

2

Discovery meeting

We meet with you, and your client where appropriate, to understand the position and outline the pathways available.

3

Coordinated plan

We coordinate the specialists involved and report back to you at each stage, working with your firm rather than around it.

Succession, estate and asset planning

Through our partner **We Love Succession**, we offer outsourced succession planning, estate planning and asset protection strategies for business owners and their families.

Strategies may involve establishing a Family Protection Trust to hold personal and business assets, including equity in the family home, supported by appropriate loan and mortgage-back arrangements. The tax and duty consequences of any arrangement are assessed case by case.

The service is designed to help clients:

- put their legal documents in order, including wills and trusts
- plan an exit strategy from the business
- consider how their business and personal assets are structured
- set up the business so that it can operate without them

Legal documentation is prepared by our legal partner.

Asset protection and succession strategies are suited to solvent individuals and businesses. We do not implement any arrangement where a transfer could defeat, delay or hinder creditors, and each matter is assessed for solvency before any step is taken.

Our group: We Love Group

We Love Group provides outsourced B2B services to accounting and advisory firms and their clients, delivered by specialist teams based on the Gold Coast.

We Love Bookkeeping

Bookkeeping and BAS agent services, including data entry, reconciliations, balance sheet maintenance and payroll.

We Love Loans

Outsourced lending support through a partnership with Lending Association, with access to more than 200 lenders: business and commercial loans, lines of credit, cash flow and debtor finance, SMSF lending, mortgages and refinancing.

Discuss a client with us

Rod Peters and the Eventum Optimum team

Please contact us by phone or email to book a time.

Phone 1300 596 377
Email info@eventumoptimum.com.au
Web eventumoptimum.com.au

The information in this document is general in nature and does not constitute legal, tax or financial advice. Eventum Optimum is not a registered liquidator or registered restructuring practitioner; where a formal appointment is required, we refer to appropriately registered practitioners. Outcomes depend on each client's circumstances and remain subject to the discretion of the ATO and creditors. Clients should obtain their own independent professional advice before implementing any strategy. Legal documentation is prepared by our legal partner. Tax agent services are provided by Naked Accounting, a registered tax agent. Eventum Optimum, Naked Accounting and the We Love Group businesses are related entities. Fees or referral payments may be received between them, and these will be disclosed to the client before any engagement.