



# The Kennas FINANCIAL SUCCESS PROGRAM



- / Chartered Accountants
- / Business & Tax Consultants
- / Financial Planners

*A history of shaping financial success*

P 07 4924 9100 / E [kennas@kennas.com](mailto:kennas@kennas.com) / [www.kennas.com](http://www.kennas.com)

ROCKHAMPTON / 5th Floor Capricornia Electricity Centre Cnr Fitzroy & Alma Sts / PO Box 201 Rockhampton Qld 4700

YEPPOON / 1st Floor, 21 James Street / PO Box 1187 Yeppoon Qld 4703

## 1. **Wealth Protection Plan**

You have worked hard to get to where you are wealth wise. Doesn't it make sense to take steps to minimise the chances of losing your wealth and protecting it from others?

- Know your wealth
- Minimise risks through asset protection strategies
- Insure against risks using life insurance and income protection insurance
- Put in place effective Wills & Estate plans

## 2. **Business Improvement and Strategy Plan**

Working in your own business has its rewards, but it can be very hard work. Have you planned where your business is heading, how best to get there, and how to make money and have a life on the journey?

- Understand your business NOW (including your financials, customers, staff and operations) and how you compare to other businesses
- Plan ahead for WHERE you want to be
- Set plans for HOW you will achieve your business goals and grow yourself, sales and profits
- Plan for innovation and culture improvement and implement business growth strategies

## 3. **Tax Minimisation and Control Plan**

Paying tax means you are making money, with the more tax you are paying meaning the more income you have. But are you sure you are paying the minimum legal tax you can?

- Use the right business structures
- Put in place the proper tax planning strategies for you and your business
- Know your future tax payments so you can manage your cashflow properly

## 4. **Growing Your Wealth Plan**

You need to ensure you have enough money and wealth for you and your family to live on both now, and in the future. Do you have a plan in place to grow your wealth to your targeted financial position, at the different stages of your life? Do you have your debt repayment plans in place and superannuation targets set?

- Record annually what your financial position is
- Have financial strategies in place to help you achieve your targets
- Maximise your business profits and business value, and maximise your return on all assets and investments you own

## **FOR MORE INFORMATION Contact**



**Darren Smith**

*Partner / Director*

*Chartered Accountant and  
Business Improvement Specialist*

07 4924 9100  
darrensmith@kennas.com



**Peter Shonhan**

*Partner / Director*

*Chartered Accountant and  
Business Improvement Specialist*

07 4924 9100  
petershonhan@kennas.com



**Naeema McDonald**

*Partner / Director*

*Chartered Accountant  
and SMSF Specialist*

07 4924 9100  
naeemamcdonald@kennas.com