

Education

Capability Statement



Nexia provides a full service accounting solution for more than **100 independent schools** throughout Australia and New Zealand. We pride ourselves on our ability to offer practical solutions to support our clients with their strategic decision making.



A close relationship

Nexia understands the challenges faced by the education sector. Our solution is to develop close, professional working relationships with our clients.

We strive to gain a full understanding of your operations and systems as well as the people who work with them.

The 'Next' Solution

We are your 'next' solution with a comprehensive schools offering, whereby:

- We assist over 100 leading schools and associations
- We offer local staff with direct schools experience
- We have a leading range of services tailored to meet the needs of schools
- We have programmes including professional development days, seminars and surveys to assist school Bursars and those charged with governance
- We have a strong industry network including relationships with Bursars' Associations, Associations of Independent Schools, the Department of Education, Employment and Workplace Relations, consulting and bank executives

Here to help

We have developed structures and processes to deliver fast, flexible and more cost-effective solutions to the education sector.

We have learnt that you want advice that is easy to understand and is backed up with one-to-one contact. When you are dealing with Nexia you are talking to people who understand

your needs and care about your school. We are here to help.

How we can help

Our experienced engagement teams work closely with you to establish a service plan that suits the needs of the school and achieves all statutory requirements. We pride ourselves on our ability to understand schools, offer practical solutions and support their team to make strategic decisions. We add value through:

- Comprehensive external and internal audits
- Compliance Audits
- Structuring of Audit committees
- Comprehensive GST and FBT health checks
- Advice on compensating controls to overcome a lack of segregation of duties
- Pragmatic "Flash report" of key metrics for school board reporting
- Salary packaging advice
- Best corporate structures for raising funds
- DGR compliance health checks
- Cash-flow modelling for scholarship funds
- Comprehensive school financial modelling for obtaining finance
- Preparation of quarterly, annual and ten year master budgets
- Identifying areas of inefficiency, cash-flow improvement and expense control
- Advice and guidance through legislative changes, including the ACNC
- Fraud investigation and other forensic accounting services

How we can add value

We have developed a range of services that pay particular attention to the formal control and management of independent schools.

Our value added solutions include:

Tax compliance

Our specialist education team and tax partners carry out detailed reviews in GST and FBT and provided feedback in respect of compliance with current Australian Taxation Office (ATO) requirements.

Deductible gift recipient issues

We provide advice on appropriate structures and changes to the tax legislation to ensure our schools are compliant and offer the most tax advantages for receiving donations.

Information technology services

We are able to provide IT system health checks and IT audits. Our services focus on the overall importance of IT to the school.

Business modelling

From our sector expertise, we engage in the preparation of long-term financial models and assumption audits for the purposes of major buildings works and DGR fund modelling.

Education of our clients

With our experience and key education contacts, our ongoing client management programme is designed to ensure our independent school clients are fully informed and are up-to-date on issues affecting the sector.



Adelaide

Damien Pozza

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e: dpozza@nexiaem.com.au

Damien uses his experience to provide efficient, effective assurance services to a number of Colleges and Schools in South Australia.

Damien understands the needs of the Education industry facing an ever-changing regulatory environment. His ability to be pragmatic in his approach and empathise with clients has seen Damien establish and maintain many long standing successful client partnerships.

Brisbane

Nigel Bamford

t: 07 3229 2022

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Nigel's primary responsibility is the completion of audit and assurance engagements for clients. His current client base includes ASX listed entities, large proprietary companies, government entities and associations, including clients in the higher education sector.

Brisbane South

Malcolm Mathews

t: 07 3229 2022

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Malcolm has a broad range of experience in both public practice and commerce spanning over 40 year.

He has experience across a broad range of industries, including many clients in the education sector.

Canberra

Garry Murphy

t: 02 6279 5400

e: gmurphy@nexiacanberra.com.au

Garry has significant experience in the education sector within Canberra and specialises in external, compliance, performance and internal audits. He also has extensive experience in the preparation of financial statements and the provision of advice on accounting standards.

Garry's audit specialty, combined with his broader general experience enables him to provide clients with high quality, value added service.

Melbourne

Andrew Wehrens

t: 03 8613 8888

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As Director of Audit and Assurance Services, Andrew has over 30 years' experience as a Chartered Accountant, providing him with a wealth of knowledge across schools and colleges and is particularly skilled in evaluating systems, controls and procedures for clients with limited financial backgrounds and can also turn up the tempo for financially savvy clients.

Perth

TJ Spooner

t: 08 9463 2463

e: tj.spooner@nexiaperth.com.au

TJ brings over 30 years of experience in the education sector gained in both the UK and Australia.

He has advised school boards and audit committees on audit issues, risk management, budgets, and policies & procedures and has acted as Lead Audit Partner for many schools and colleges engaged in the education sector.

Darwin

Noel Clifford

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Noel has been involved in the audit of Colleges and Schools throughout his career and has an extensive portfolio of Colleges and Schools which operate in South Australia, Western Australia and Northern Territory.

He was appointed Chair of the Nexia Australia Specialist Education Industry Group. His expertise within this industry is of note and allows Noel's clients within this space to work with a Partner who truly understands the challenges facing schools and how to address them.

Sydney

Lester Wills

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With over 18 years audit and assurance experience, Lester has had the opportunity to work with a wide selection of clients, particularly in the education sector.

His professional partnership approach combined with this ability to tailor strategies and advice ensures his clients achieve best practice in financial reporting, risk management and related controls.

Christchurch

Doug Allcock

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Few Chartered Accountants offer the depth of experience across the Education industry that Doug has gained over three decades.

Specialising in Early Childhood Education, Doug offers a superior standard of service, accuracy and accountability to all of his clients.

Contact us

For further information or to discuss how Nexia Australia can assist your organisation, please contact a local Nexia Advisor below.



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