

Not For Profits



We are here to support you to allow **you to focus** on your important work.



SAWARD
DAWSON



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Our Not-For-Profit Services

Specialists Who Care

Saward Dawson is known for its longstanding commitment and proven expertise in the not-for-profit sector.

We are currently working with hundreds of organisations in the not-for-profit sector throughout Australia and beyond. Each not-for-profit has its own distinct needs and obligations.

To help you meet those needs, I am pleased to introduce some of our passionate and experienced leaders who have expertise across the not-for-profit sector.



Peter Shields
Managing Partner | Audit and Assurance
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Tax Concessions & Structuring

Well versed and highly knowledgeable in a large range of tax issues, our tax division can advise on the ability to obtain charity status and tax exemptions. We are able to assist in establishing your non-for-profit entity, including applying for charity registration and endorsement of the tax concessions if applicable. We can also review your existing entity to determine whether it is correctly registered, advise on what tax concessions it is entitled to and whether there are any risks to your registrations.

Appropriate organisational structuring, optimising tax concessions and managing taxations risks are critical for not-for-profit organisations. Accordingly, we are uniquely placed to assist you in this space to navigate the complexities of tax and charity compliance obligations and reporting.

Remuneration

The Remuneration Services team actively assists many organisations in ensuring that they are providing the most effective remuneration packages to all staff.

We are able to advise on your eligibility to access salary packaging and can ensure that they are implemented correctly and tax-effectively. Additionally, we are able to ensure that the remuneration your business provides is compliant with employer obligations.

Murray Nicholls leads our Remuneration Services team. Murray is a specialist in various areas of remuneration including fringe benefits tax and salary packaging.



Cathy Braun
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Murray Nicholls
Director | Remuneration Services & Business Advisory
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Wealth & Investments

Our wealth advisory team assists not-for-profit organisations to develop a formal investment policy that sets clear financial goals, determines risk appetite, develops a governance framework, and articulates an aligned risk-managed investment strategy.

Our service assists our non-for-profit clients to confidently manage their investment assets, including enhanced cash management strategies, with the support of a professional advisory and investments team. In support, we provide ongoing advice, investment education, proactive portfolio management, plus comprehensive administration and investment reporting.

Our aim is to help our not-for-profit clients become better stewards of their financial resources, to be more informed about their investment options, to maintain a strong risk-managed governance process, and to securely manage investments with a professional investment team dedicated to achieving their objectives.



Mark La Bozzetta
Partner | Strategy & Wealth Advisory
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Consulting, Accounting & Advisory

We assist many clients with consulting and advisory services, including the following specific services that we provide to many not-for-profit clients:

- Bookkeeping services
- Preparation and review of activity statements
- GST and other tax advice
- Preparation of year end reconciliations, including assistance with audit preparation
- Board reporting and cash flow forecasting
- Setting up, conversion and assisting with accounting software
- Ensuring your affairs comply with various Australian Taxation Office requirements
- Meeting your annual compliance obligations
- Assisting with the sale, merger or restructuring of your organisation
- Preparation of income tax returns, including returns for mutual organisations



Shervy Dahilana
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Shinyi How
Team Leader | Business Advisory
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Audit & Assurance

We undertake approximately 300 audit engagements in the not-for-profit sector every year, providing us with deep experience and the development of significant expertise in our assurance team.

We understand that our clients are not only after a quality audit but also a professional partner who can provide additional value through accurate and timely advice, sector knowledge, training opportunities and a commitment to continuous improvement processes.

Our services include financial statement audit, financial statement reviews and grant acquittals.



Jeff Tulk
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Matt Crouch
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Church Finance Handbook

The Saward Dawson Church Finance Handbook has been prepared to provide easy to apply advice to Church Treasurers. It is made up of three sections, GST Handbook, Treasurers Handbook and Finance Resource Centre.

GST application and concessions is a complex maze for not-for-profits. To assist, we have created a GST Guide for Treasurers outlining GST principles and concessions and how they apply to not-for-profits. This invaluable resource is constantly monitored and updated to ensure Church Treasurers are provided with clear, accurate and understandable guidance.

In addition to the GST Handbook, we have produced a Treasurers Handbook. This guide contains information and easy to apply advice on a large number of essential areas for the financial management of your church.

The Finance Resource Centre includes many templates and resources to be used within the finance management of a church.



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