

2010 Xmas Newsletter

Welcome to the final newsletter for 2010 from **SVS Management Group Pty Ltd**. With the year rapidly coming to a close, it is time to review 2010 which has been an extraordinary year for our business. The changeover to the new owners (Julie, Debbie and Troy) progressed smoothly as we expected it would, with little change to the personnel and culture of the business:

Stephen Shortis is still working full time and servicing the many loyal clients who have helped to make the business such a success over the past 3 decades, whilst **Troy, Julie, Debbie, Craig** and **Leanne** continue to learn and improve their skills. Our newest accountant **Ryan Cawte** has now been with us 18 months and has built up an impressive stable of clients to whom he provides accounting, management, tax and now superannuation advice.

The Self Managed Superannuation Funds (SMSF's) part of our business has increased remarkably and keeps **Sue Dickson** and **Cherylyn Batten** busy on the administration side, and **Cliff, Steve** and **Julie** busy on the investment, taxation and financial planning side. Another part of the business that has shown amazing growth is the retirement village/nursing home/special accommodation part which no doubt reflects the aging of our population but also the high level of knowledge that **Cliff Evans** has achieved in this area. Our Centrelink clients continue to be well looked after by **Meg**, with an increasing number taking advantage of our Total Centrelink Care service.

Steve has also expanded the Estate Planning part of the business whilst **Jess Mitchell** still manages our Bendigo Bank agency which gets bigger and bigger.

Despite the national trend towards taxpayers lodging their own returns, this part of our business is still increasing and **Angela** and **Chris** continue to process the returns and refunds promptly and efficiently whilst **Jean Shortis** continues in her Office Management role (albeit on reduced hours).

Kate, Tony and **John** continue to provide additional assistance when needed.

SVS Management Group Pty Ltd's commitment to use the latest technology has seen the introduction of new software for our SMSF and Financial Planning clients and increased usage of BankLink, MYOB Live Accounts, Stockdoctor, CARM and plans for new Financial Planning software in early 2011. This expensive but necessary commitment means we can still lay claim to being one of the most efficient and cost effective providers of these services in Australia.

As mentioned above, our staff continued to develop and improve their education: **Julie Gill** gained her Public Practice Certificate, **Troy Shortis** completed his qualifications and **Cliff Evans** and **Steve** passed the new Margin Lending competency test (missing only one question between them!)

On a personal note, many significant milestones were achieved by the staff this year:

Jean Shortis celebrated her 60th birthday.

Angela Russell celebrated her 40th birthday.

Craig Naisbitt became engaged to Fiona.

Ryan Cawte purchased his first home.

Craig Naisbitt sold his home.

Sue Dickson's eldest son, Gary headed off overseas to South America.

Jean & Steve Shortis celebrated their 40th wedding anniversary.

Tony Shortis became a grandfather for the first time.

Angela Russell married Scott Town.

Craig Naisbitt celebrated his 30th birthday.

Julie Gill celebrated her 30th birthday.

So, all in all, it was a massive year at **SVS Management Group Pty Ltd**. We hope that your year was as successful and eventful as ours and that we were able to play some part in you achieving your goals, whatever they may have been.

We look forward to continuing our good relationship into 2011.

Merry Xmas from the crew at SVS Management Group Pty Ltd