



Wis Australia

Audit | Accounting | Tax | Advisory
Corporate Finance | People Services



Foreword



Wis Australia is a full-range professional service group and has been dedicated to offering professional services to multinationals and local businesses to support their growth for many years. With a capable team of bilingual professionals, Wis Australia is strongly positioned in providing pragmatic solutions to meet our clients' needs for business compliance and advice.

As a key founder of Wis Australia, I am proud to deliver you this presentation to highlight Wis Australia's professional service capabilities, approaches and real solution examples that we have been continuously practicing and improving. This presentation also explores our core values, missions, client credentials and team's expertise and qualifications.

The heightened compliance requirements, coupled with the tightening of government regulation, are posting greater challenges to Businesses and our clients in Australia. In the later part of this document, we also take you through some examples of how we help our clients turn complexity into simplicity and overcome challenges facing them - such as audit and assurance requirements, tax planning and compliance, shortage of experienced bilingual workforces, acquisition of local businesses.

Please feel free to contact me if you would like to discuss any aspects of this presentation. Our team is always ready to assist you in every way.

Wis Australia

A handwritten signature in black ink, appearing to read "Mike Liang".

Mike Liang
CEO

Content

- 01.** Company Profile
- 02.** Our Services
- 03.** Our Clients
- 04.** Membership & Licenses
- 05.** Our Team
- 06.** Contact Us





01. Company Profile



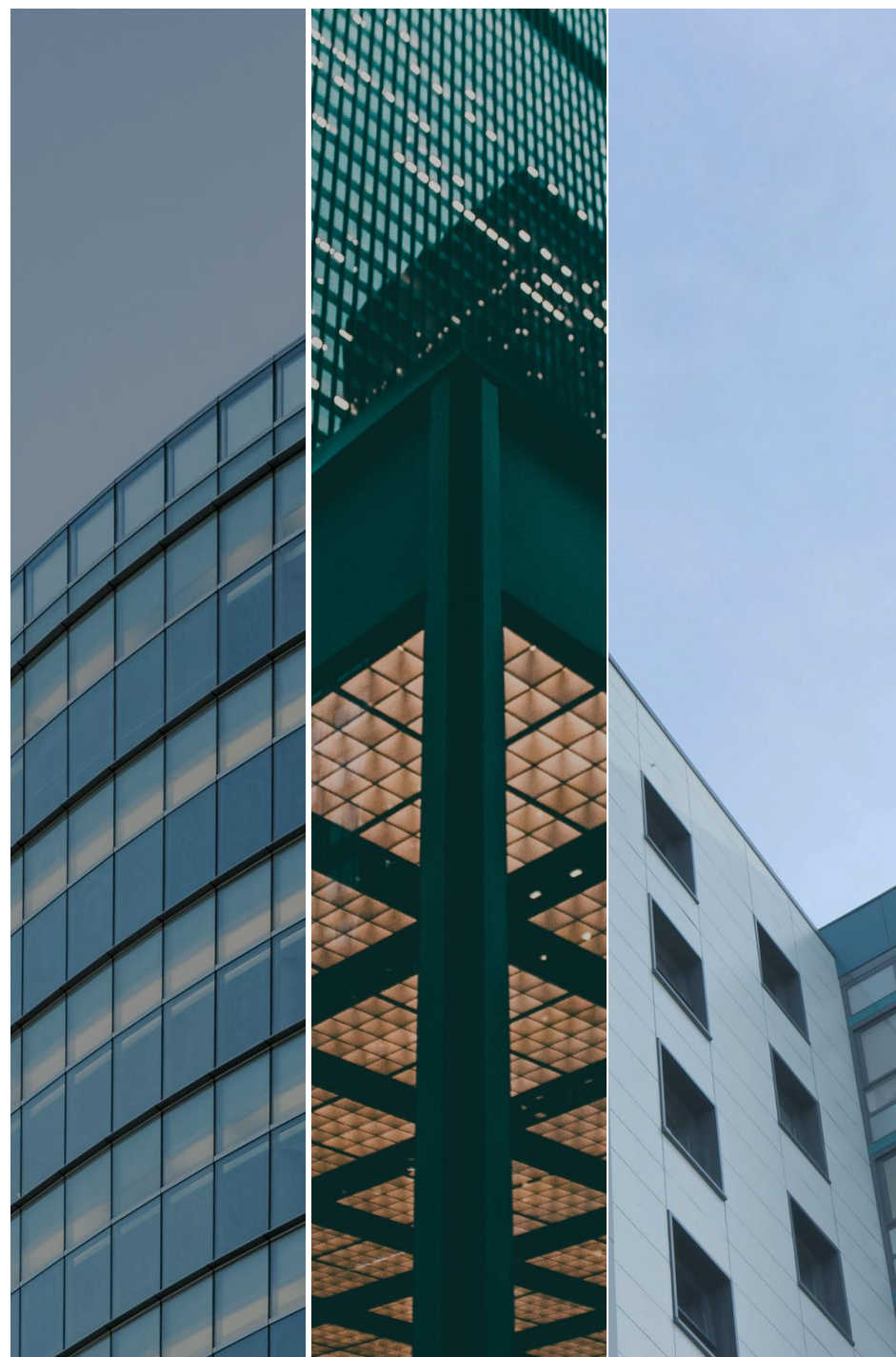
About Us

Wis Australia is a full-range professional service group. We have dedicated ourselves to offering accounting, tax, audit and other advisory services to multinationals and local businesses and supporting their growth since 2013.

We have full spectrum of professional qualifications and licenses. Our people are all well trained and highly experienced in their specialised area. Working together, we are capable of providing comprehensive professional services and sharing diverse experiences and in-depth insights.

Our clients include multinational enterprises' presence in Australia, large private businesses, entrepreneurs, and high net-worth individuals, across a broad array of industry sectors.

Our main office is located at Sydney in Australia. We also have affiliated office at Brisbane in Australia and Auckland in New Zealand.





Support **multinational corporations** settle down and achieve their Australian strategies smoothly.



Support **local business and entrepreneurs** achieve sustainable long-term success and maximise their value.



Support **people** to thrive and shine, acknowledging and rewarding their abilities and loyalty.



01. Our Mission

Our Core Values




Achieving

- We do what we say
- We focus on what matters
- We love achieving

Together

- We do what makes us together
- We focus on mutual prosperity
- We love collaboration

Wisdom

- 
- We do what is right
 - We focus on self-improvements
 - We love wisdom





02. Our Services

Audit and Assurance Services



● Financial Report Assurance

- Statutory financial report audit/review
- Special purpose financial report audit/review



● Compliance Audit

- AFSL Compliance audit (FS71)
- Trust account audit
- Other compliance audit
- Acquittal report



● AFRS/IFRS Reporting

- Preparation of financial report
- Technical AFRS/IFRS advice and training

Audit and Assurance Services



Internal Audit

- Strategic assessment of internal operations
- Quality assurance reviews
- Training



Management Audit Support

- Audit readiness support
- Risk management and corporate governance
- Assistance on government/ASX enquiry of financial reporting



Assurance Related Service

- Financial due diligence
- Agree-upon procedures
- Historical financial information assurance
- Assurance on prospective financial information
- Immigration Audit

Business and Tax Service



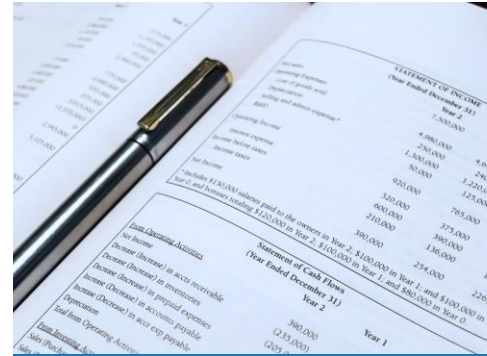
Corporate Service

- Business registration
- ASIC agent service
- Bank account support
- Other secretary service



Client Accounting

- Bookkeeping
- Month-end accounting
- Management reporting



Tax Compliance

- Activity Statements (BAS/IAS)
- Year-end financial report and tax returns
- FBT returns
- TPAR



International Tax

- Transfer Pricing
- CBC report/Local file
- Other technical support

Business and Tax Service



Business Process Outsourcing

- ❑ Accounts receivable
- ❑ Accounts payable
- ❑ Payroll service
- ❑ Payment preparation



Government Incentive

- ❑ R&D Incentive assistance
- ❑ Entrepreneur allowance
- ❑ EMDG
- ❑ Other government funding



CFO Support

- ❑ Budgeting and Forecasting
- ❑ Design, setting and tracking financial targets
- ❑ Rebuilding/Improving financial work process
- ❑ Strategy and structuring

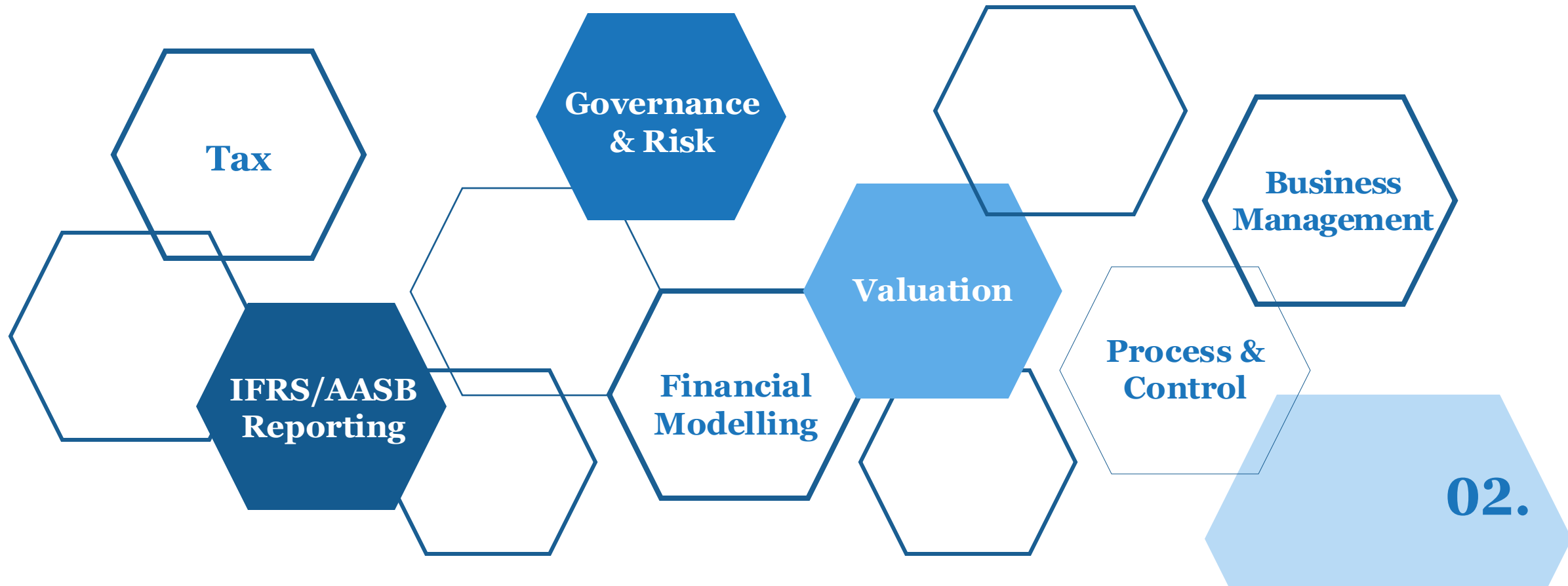


Individual tax

- ❑ Individual tax returns
- ❑ Individual tax planning
- ❑ PAYG variation
- ❑ Land tax compliance
- ❑ Other individual tax service

Advisory

We have specialists in industries (e.g. renewable energies, real properties, e-commerce, bio-medical etc.) as well as technical areas (e.g. IFRS, corporation tax, GST etc.) to share with you the experience and insights.



Other Services



People Service



- Independent/Local director service
- Talent searching and recruitment
- HR consulting & strategic Planning
- HRBP outsourcing
- Staff secondment service



Corporate Finance



- IPOs and RTOs
- Corporate financing
- Mergers and acquisitions
- Capital management
- Corporate Strategic advisory

02. Our Service Approach

How we use our professional capabilities and experience to help clients to achieve their strategies.

01

Initial Planning

- Initiate Support
- Identify Projects
- Understand Client Needs
- Choose Appropriate Structure And Financing Schemes

02


Establishment

- Corporate And Tax Registration
- Banking Registration
- Compliance Reporting
- Tax Planning

03

Ongoing Support

- Corporate Secretary Services
- Accounting Outsource
- R&D Allowance
- HR And Payroll Management
- Tax Compliance
- Tax Advisory
- Audit/Transaction service

The background is a solid blue color with a faint, semi-transparent image of a person sitting at a desk, working on a laptop. A coffee cup is visible on the desk in the foreground. The overall aesthetic is professional and modern.

03. Our Clients

Multinationals

We provide services to many multinationals in Australia. Most of them are overseas listed entities or reputable international private groups, to help them settle down in Australia and achieve their Australian strategies smoothly. We are proud of being capable of covering service needs where top-tier firms are not able to satisfy.



Local Business



We also provide services to many local businesses and entrepreneurs, to help them achieve sustainable long-term success and maximize their value. We have both standardised and tailored approach for them to deliver what they need for now and for future.

03. Our Clients



03.



Client Stories



01.

Assistance in Acquisition

A client wanted to acquire a business segment of a listed company in Australia. We assisted them at the very beginning with structuring of the acquisition from the buyer perspective and performed a well-tailored financial due diligence of the business segment. We also advised on key inputs of the valuation. Our practical all-rounder services and extensive experience in merger and acquisition provided valuable findings for the client's decision and significantly reduced the client's transaction costs compared to other service providers.

02.

Hedging Accounting

Without hedging accounting, the income statement is vulnerable and fluctuates significantly. We help clients put the big-four-auditor-accepted hedging documentation in place to meet the requirements of hedging accounting. As a result, the statement of profit & loss of the client becomes more consistent and reflective of the substantial business.

03.

Financial Reporting

In Australia, the preparer of the financial report is normally required to be different from the auditor. Hence, the competency of the preparer of the financial report is very important for companies and the audits. As we are licensed company-auditors, we fully understand the reporting standards and auditor's requirements. We have assisted our clients to save cost in preparing financial reports accepted by the big 4 auditors and coordinate directly with auditors to save the client time significantly.



03.



Client Stories



04.

Long-term Tailored Service

Since 2014, we've supported a large Chinese state-owned company's entry into Australia, initially aiding with incorporation and setting up accounting processes. As in-house accountants, we ensured compliance with the parent company's standards, offering routine bookkeeping and reporting services. We also helped establish an internal finance team before transitioning routine tasks to them. Our focus has since shifted to providing advice and support for complex and project-related endeavours.

05.


Audit Approach

A real-estate company has grown to reach the 'large' threshold and a statutory audit is required. Meanwhile one of the big 4 accounting firms they hired, was holding off the tax return due to the poor quality of the financial records and reports. We were engaged as the external auditor of the company. We took a practical substantive approach to perform a detailed investigation of audit findings and proposed audit adjustments for all identified issues based on the audit evidence and managerial responses. With the assurance provided in the audited financial report, the tax return was finalised within the due date. We have also provided insights to help them improve the process of financial reporting.

06.

Specialist Advisory

Alongside the development of the company, we provide accounting and tax advice on complex acquisition and hedging accounting to meet management's internal needs and the internal corporate auditors' requirements. We also provide advice on ad-hoc questions raised by clients on a day-to-day basis to give them support in an efficient way. We have built seamless communication and trust in the client's team together with their other professional service providers like lawyers, banks, and auditors.



04.

Membership & Licenses



Membership & Licenses

With a broad spectrum of service licenses and capabilities, Wis Australia service entities are capable of delivering more comprehensive and integrated services to meet our clients' needs. We are also confident in partnering with high-profile clients and co-operating with other service providers.

Member of the professional bodies



CHARTERED ACCOUNTANTS
AUSTRALIA • NEW ZEALAND



The Tax Institute

Professional Licenses



ASIC

Authorised Audit Company
No. 528780

ASIC

Registered Agent
37780



Business Partners




Australia China Business Council
澳大利亚中国工商业委员会



澳大利亚中国总商会
China Chamber of Commerce in Australia



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05. Our Team



Our Team



Mike Liang
Senior Partner

Mike, a co-founder of Wis Australia, boasts nearly two decades of professional experience spanning various industries. His expertise includes tax compliance, AASB/IFRS reporting, audit, process improvement, M&A transaction services, and business management and growth advisory. Having held senior positions at international accounting firms like KPMG, PwC, and Mazars, Mike brings robust technical capabilities to his role. He specializes in statutory financial reporting, external and internal audit, process improvement, M&A transactions, financial due diligence, and AASB/IFRS advice. Serving a diverse clientele, including global 500 companies investing in Australia and local private groups across industries such as science, manufacturing, renewable energy, real estate, construction, medical, pharmaceutical, education, servicing, fund, and assets management, Mike provides practical and compliant solutions tailored to their needs. His clients include prominent organizations like Beijing Clean Energy Group, SAIC, CECEP, Unionpay International, CRRC Yangtze, Ctrip Travel, Taiping Insurance, Lesso Group, Tigermed, Enirgi Mining Group, and Oppo Mobile.



Eric Wang
Partner • Audit and Assurance

Eric is one of the founders of Wis Australia. Eric is a highly experienced accounting professional with a comprehensive background in financial statement audit, financial reporting, risk management, internal audit, hedging arrangements, and other consulting services. His clientele includes companies listed in China, Hong Kong, the US, and ASX, as well as various private and public sector organizations. With over eight years at both PwC Beijing and PwC Australia, Eric has nearly ten years of commercial experience in the mining industry, e-commerce, and cross-border trading, serving as a risk manager and business operation manager. Additionally, as a co-founder of Wis Australia, he leverages his wealth of experience in accounting, offering practical solutions to startups and entrepreneurs for financial management and compliance. His insights, garnered from serving diverse clients including global 500 companies across manufacturing, renewable energy, real estate, technology, and pharmaceuticals, drive success across industries.



Our Team



Lucia Lai
Director • Audit and Assurance

Lucia has over 10 year's professional experience in accounting and advisory. She manages our passionate and capable audit team to deliver value to our clients during the process of audit engagements. Her expertise includes covers auditing services, transaction service and in-bound investment advisory. Before joining Wis Australia, she worked at PwC both assurance and advisory team since graduate. During her time with PwC, she played a key role in delivering audit service to clients in energy & resources, logistics, education and not-for profit organisations. She also actively participated the M&A and transaction advisory for China outbound investment in Australia and successfully support their business establishment and growth locally.



Alvin Fung
Senior Manager • Audit and Assurance

Alvin is an experienced audit professional with over 15 years in the field. Before joining Wis Australia, Alvin held positions at RSM Hong Kong and Deloitte Australia. He has a proven track record working with listed and private clients across diverse industries, including Manufacturing, Security Guard Services, Retail, International Trading, Real Estate Development, Theme Parks, Cryptocurrency Mining, Game Publishing, Esports, Financial Services, Renewable Energy, Mining, and Cloud-related Services with operation across Asia-Pacific region including Australia, China, Hong Kong, Malaysia, Singapore, Vietnam and Philippines.



Ron Bao
Manager • Business and Tax Service

Ron has accumulated strong experience in professional services arena. He has demonstrated professional capabilities in both technical advancement as well as acumen for client service management. With Wis Australia, he has been widely involved in business advisory and taxation services for multinational groups, local companies and individuals in Australia. He manages our vigorous and committed business and tax team to deliver exceptional services to support our clients. His industry experience includes real estate, energy, construction, automotive, luxury and ecommerce industries.



Our Team

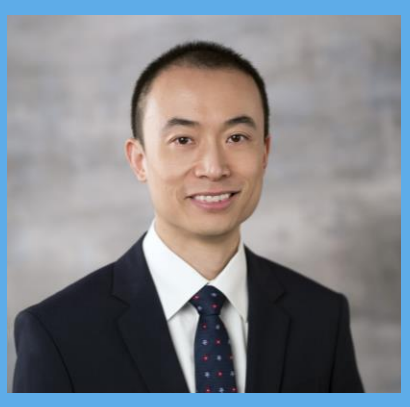
05.



Eric Sun

Director • Capital and Corporate Service

Eric has extensive experience in all areas of corporate finance with a particular emphasis on IPOs and RTOs, capital raising, mergers & acquisitions, capital management, and strategic advisory. Prior to joining Wis Capital, Eric was the Director and Head of Investment Banking of an Australian national investment banking group. He also specialises in assisting early-stage, growth companies from emerging industries to develop business strategy, execute the business plan, get investment ready, raise capital, and execute exit strategies. Eric holds a Bachelor of Science degree from Fudan University, and a Master of Accounting degree from the University of New South Wales.



Michael Shu

Principal Consultant • HR Service

Michael is a seasoned Human Resources expert on both strategic and operational dimensions. He has more than 20 years' experience with leading global organisations in Asian countries and Europe. Michael's core expertise is the design and implementation of leadership training and organisational development programs to generate near term benefits for organisations and talents. Michael is certified to administrator Hogan and MBTI assessment tools. He has rich experience in talent assessment for recruitment and leadership development. He has more than 500+ hours of coaching experience on middle to senior leaders. He is also a DDI certified facilitator. He has 700+ hours of experience in sales/management/leadership training. Michael also holds EMBA degree from CEIBS.



Su Jet Lee

Payroll Specialist • Payroll

Jet helps organisations to improve their payroll processes, to ensure they are getting the most value out of their payroll function, paying the right amount of their employment obligations and 100% payroll compliance. Coming out of Page Group and over 14 years' experience as a payroll specialist. Su Jet had managed over 4000+ payroll process within Australia interstate and New Zealand, Singapore and Hong Kong. Su Jet also has experiences in implementing modern award into payroll system to improve process efficiency. Su Jet has been dealing with ATO, Fairwork, Revenue department and NZ IRD department frequently, just to make sure payroll compliance. His past clients include Coles, IBM, BHP and Telstra labour hire employees etc.



Specialists Group



Colin Parker
Reporting Specialist

Colin Parker (FCA) is our special counsel on AASB accounting and reporting. He is an acknowledged expert in financial reporting, auditing and corporate governance. He is a member of the AASB and previously the Director of Accounting & Audit with CPA Australia. He provides independent financial reporting solutions to more complex and risky areas.



Stephen LeGreca
Audit Specialist

Stephen LeGreca is our audit quality reviewer and independent consultant on accounting standards, ISAs and compliance. Previously, Stephen was an audit partner at BDO and chairman of the BDO Sydney office.



Rod Henderson
Lead Tax Counsel

Rod is our independent tax specialist. He has over 20 years' experience with KPMG as a tax partner and bring a group of senior tax specialists to us. Rod has assisted a range of Australian and international companies to navigate the complexities of taxation, business, finance and government policy to successfully grow and expand. As lead tax adviser on some of Australia's largest transactions, Rod has experience with takeovers, mergers, IPOs, divestments, joint ventures, capital raisings and complex funding arrangements.



06.
Contact Us



Contact Us



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Thank You

“Wis Australia” is a registered trade name of Wis Australia Pty Ltd and its affiliated entities which hold various practice licenses required for relevant professional services.

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