

# Kallie Lam



## Associate Director

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## Qualifications

- Bachelor of Business (University of Technology Sydney)
- Graduate Diploma of Chartered Accounting, Chartered Accountants Australia and New Zealand
- Chartered Tax Advisor
- Diploma of Financial Services (Financial Planning), Kaplan Professional
- Justice of the Peace

## Memberships

- Registered Tax Agent
- Chartered Accountants Australia and New Zealand
- The Tax Institute, CTA

## Background

Kallie is an Associate Director at Ecovis Clark Jacobs with more than 20 years of public practice experience in the accounting and business services profession. Over that time Kallie has forged extremely strong and loyal relationships with clients, enabling her to provide hands-on assistance in their accounting and tax needs, whether on a day-to-day basis or just at year end. Kallie values her clients and provide quality service on a technical and personal level.

Kallie advises in a variety of industries including professional services, restaurants, primary production as well as high net wealth individuals.

Kallie also specialises in developing practical asset-protection and tax-effective structures for clients and their family and business interests.

## Significant Matters

**Multi-entity structures** - Taxation and business service advice in relation to multi-entity structures in particular with the flow of funds, asset protection and tax effective distributions to group members.

**Structuring** - Advising on structures for start-ups or existing businesses to cater for the clients circumstances.

**Debt Structuring** - Advice on structures to use for asset protection, tax deductibility and flexibility in relation to business and property purchases to maximise deductible borrowing capacity and return equity.

**Asset disposals** - Advice in relation to the tax consequences of disposal of investments such as real property and business assets and access to small business concessions.

## Areas of expertise

- Taxation and Business Advisory
- Tax management
- Business and investment structuring for asset protection
- Rental property advice
- Debt Structuring
- Buying and selling businesses Succession planning
- Superannuation
- Entering and exiting Australia