



## Our Company

ECOVIS Clark Jacobs is based in Sydney's CBD. We are currently a seven-partner firm with a core staff of highly trained professionals. Through our growing reputation as a proactive and committed accounting and advisory firm, we have grown steadily over recent years to become a real alternative to the major accounting firms.

## Services

ECOVIS Clark Jacobs has developed expertise in providing services to clients in specialised sectors such as medicine, dentistry, law, and financial services. The firm serves a significant number of clients in each of these areas, as well as wealthy business owners and investors.

Additionally, we provide a full suite of services, including audit and resident director services to many Australian subsidiaries of foreign companies.

We offer financial accounting and taxation services, as well as proactive involvement with management in operational areas such as budgeting, regular management reporting, and financial progress monitoring. We pay particular attention to asset protection, business and investment structures, wealth creation, succession planning, and exit strategies to effectively meet our clients' needs.

## International Affiliation

As a member of Ecovis, one of the world's fastest-growing accounting networks, we have direct access to over 11,000 accounting, tax, audit, and legal professionals across 90 countries worldwide. This significantly enhances our ability to source qualified experts for clients seeking to expand their businesses outside of Australia.

### Our clients benefit from:

- Access to firms across the globe who share our vision and values and provide equally high-quality services.
- Specialist and local expertise in the jurisdiction in which they operate.
- Information about international trends and changes to ensure our clients are fully informed of issues that could potentially affect their business.

## Our People

As a modern advisory business, at ECOVIS Clark Jacobs we focus on attracting and retaining highly talented individuals to assist clients in their growth. We have made a deliberate effort to hire and develop a team of proficient business advisors with vast knowledge and expertise that our clients can rely on.

Our directors have diverse backgrounds and experience in both Australia and internationally, having worked at both Big Four accounting firms and mid-tier firms. With diverse working backgrounds, interests, and specialisations, we are well-equipped to advise our clients on any significant matter that may affect their business.

### David Conley



David is a Director of the firm with more than 25 years of experience in tax and business consulting. Before joining the firm, David worked with Ernst & Young, Deloitte, PwC and several boutique firms, specialising in indirect tax. He enjoys the greater depth and personal involvement required in consulting and advising for high-net-worth family groups and SMEs across a diverse range of industries.

David's diverse career has provided him with a unique perspective and understanding that tailored, client-focused, and practical problem-solving are essential for adding value and meeting clients' needs.

### Heath Stewart



Heath is a Director of the firm with over 25 years of experience in business services, taxation, audit, and consulting.

Heath has developed a specialisation in the medical and dental industries but also works with clients in publishing, professional consulting, legal practices, building, construction, civil contracting, and manufacturing.

He enjoys collaborating with clients to tailor our services to their specific needs. This includes comparing industry KPIs, forecasting, making projections, providing financing advice, and creating efficient tax structures.

### Jakin Loke



Jakin is a Director at ECOVIS Clark Jacobs with more than 20 years of experience in public accounting and business services.

He primarily advises on taxation, business structuring, asset protection, financial systems, and compliance. Jakin is dedicated to providing high-quality and valuable service to his clients, who include professionals, high net worth families, SMEs, and corporate groups.

Jakin works closely with clients from various industries, such as advertising, media, investment, financial services, retail/wholesale, construction, and healthcare.

### Elissa Lippiatt



Elissa is a Director of the firm, and has over 20 years of experience in public practice. Elissa provides specialist advice in financial accounting, taxation, audit, corporate governance, corporate strategy, and corporate secretarial services across various sectors.

Her clients include start-up businesses, high net worth family groups, unlisted reporting entities, listed companies, and government-owned corporations. Elissa enjoys collaborating with her clients to build strong relationships and provide innovative and practical solutions to assist them in resolving issues.

### Scott Hogan-Smith



Scott is a Director of the firm with over 20 years of public practice experience in boutique firms in Perth and Sydney. He has experience in business services, taxation and consulting with particular interests in due diligence, tax effective structuring and working with subsidiaries of multinational companies. Through an exchange with a large consulting firm in the United States, Scott has also gained invaluable experience in the international business environment.

Scott actively engages with clients in a broad range of industries including high net worth individuals, media, online, dental and legal practices, and government agencies.

### Alison Lacey



Alison is a Director of the firm and joined Ecovis Clark Jacobs in 2003, when the firm she led merged with Clark Jacobs. With over 25 years of experience in public practice, Alison provides business services and tax advice to a large number of small business clients particularly in the fields of medicine, dentistry and law.

Alison also works with high net-worth clients and has an interest in self-managed superannuation structuring and advice. Ecovis Clark Jacobs has more than 100 medical and dental practices as clients and Alison advises the majority of these practices on business and personal matters.

### Umer Altaf



Umer is a Director of the firm and has over 20 years' experience in audit and assurance services in both boutique and large mid-tier firms. Umer has extensive experience in the audit of ASX listed and medium to large private companies, including those in information technology, hospitality, manufacturing, entertainment & tourism, construction services consumer services, non-government schools and public sector audit engagement.

Umer collaborates with his clients and proactively identifies opportunities to add value to their business by identifying significant risks and internal control deficiencies, and provides pragmatic recommendations for improvement.

**Clark Jacobs Pty Ltd  
Accounting & Business Advisers**

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