

## About Pinnacle Advisors

Welcome to Pinnacle Advisors, where our mission is clear: to deliver professional, dependable outsourced accounting and taxation solutions to a diverse clientele across Australia.

### Caters To

- Local bookkeeping firms
- CPA / CA firms
- Registered Tax Agents (RTA)
- Australian small businesses



#### Bookkeeping Services



#### Taxation Compliance



#### Financial Analysis & Reporting



#### Software Training

## Why Pinnacle Advisors?

### Cost Efficiency

We offer a cost-effective solution that allows you to access the expertise of our financial experts and advisors without the need to hire full-time employees

### Confidentiality

Our non-disclosure agreements are designed to ensure that your financial information remains strictly confidential and is not disclosed to any third parties without your explicit consent

### Contract Basis

No lock-in period or minimum commitment period. Our aim is simple to provide top-notch quality services with quick turnaround time

### Cloud Services

With robust encryption protocols and multi-factor authentication, the data is protected from unauthorized access and cyber threats

### Customized Solutions

We offer valuable customized accounting and taxation solutions tailored to the specific requirements of the Australian accountancy and taxation firms



[www.pinnacleadvisorss.com](http://www.pinnacleadvisorss.com)

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## About The Founder

Vidhi, an Indian at heart and an Australian Chartered Accountant by profession, embarked on her overseas journey in 2016 when she first travelled to Sydney, Australia, to pursue higher studies at one of the Australia's top 8 universities. She immersed herself in the vibrant Australian culture and kickstarted her career by working in a local boutique CA firm.

She achieved the highest form of Accountancy qualification early on in her career with over 5+ years of robust technical expertise under her belt within Accounting and Taxation domain. She also earned recognition as a Registered BAS Agent, equipped with the essential bookkeeping skills necessary to empower small businesses.

She is known for her boundless enthusiasm and unwavering commitment to her clients' success whether in the boardroom or in her community, she brings the same level of dedication and passion to everything she does, embodying the ethos of excellence and integrity in all endeavours.

## Qualifications

- **Chartered Accountant (CA)**, Chartered Accountants Australia and New Zealand (CAANZ)
- **Graduate Diploma of Chartered Accounting (GDCA)**, Chartered Accountants Australia and New Zealand (CAANZ)
- **Registered Business Activity Statement (BAS) Agent**, The Tax Practitioners Board (TPB) Australia
- **Master of Professional Accounting (Extension)**, University of New South Wales (UNSW) Australia
- **Bachelor of Commerce**, University of Mumbai, India



**Vidhi Ashik Mody**  
Founder, Pinnacle Advisors

# FOUNDER



# SERVICES



**PINNACLE**  
ADVISORS



## Bookkeeping Services

- Bank reconciliation
- Accounts Receivable/Accounts Payable
- Inventory Tracking & Management
- Payroll Services
- Cash Flow Forecasting & Budgeting
- Seamless integration of third-party software such as PayPal, Stripe, and Shopify
- Inter-company transfer/loan reconciliations across multiple entities
- Comprehensive Financials (Balance Sheet, Profit and Loss Account and Cash Flow Statement)



## Taxation Compliance

- Individual & Business Tax Returns
- Fringe Benefit Tax Returns (FBT)
- GST Returns (BAS)
- Electronic Tax Workpapers



## Financial Analysis & Reporting

- Finalization of Year-end accounts
- Year-end adjustment journals
- Electronic Accounting Workpapers
  - Division 7A
  - FBT
  - GST
  - Hire Purchase/Chattel Mortgage
  - Inter-company loan adjustments
- Outsourced CFO services (Financial Statement Analysis)



## Software Training

- Introduction to the Australian Tax System
- Australian Income Tax Return Training
- Australian GST Return Training (BAS)
- Australian Fringe Benefits Tax Return Training (FBT)
- Accounting software training

\*Customized training material/courses can be designed as per requirement on the above topics



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Vidhi has been a pleasure to deal with and I will use her services ongoing! She is super professional and kind. I look forward to growing my beauty business with you.

- **Jemma McMillan**, Beauty Salon

Vidhi has been very efficient and has very good knowledge and understanding of bookkeeping. She quickly understood the company nature of business and was successfully able to apply the business logic to bookkeeping.

- **Vandhana Chand**, NDIS

Extremely happy and satisfied with the help I got from Vidhi. She was very professional, had a good understanding of Xero and was very patient in helping me understand a lot of things. Highly recommended.

- **Freye Gosbee**, Digital Marketing

So so, easy to deal with. Professional, methodical, and fast. I would highly recommend Vidhi for any accounting needs. I personally and my company look forward to building a good working relationship with Vidhi into the future.

- **David Lakes**, I.T. Consulting

Vidhi was extremely helpful and knowledgeable in setting up a new business and employee payroll in MYOB. She communicated at all stages of the task and went above and beyond to ensure all the information was correct. Thank you Vidhi!!

- **VKate Rennie**, Café/Restaurant

# TESTIMONIALS



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