



NBC Happenings...

October 2013

BUSY TIMES AT NBC

Staff at NBC have been busy providing Taxation and Financial Planning Services over the past 3 months. It's a flat out time of year and with three offices open this tax season, we have been especially busy. We are looking to combine our two Mount Gambier offices prior to next season's rush. We will keep you updated as to location and timing of the move.



Rex Whittaker and Sharon Fox

FINANCIAL ADVICE

Sharon has been busy in Millicent, Mount Gambier and Naracoorte meeting with clients that have been identified as requiring advice by our tax preparers. NBC's Free Financial Health Checks at tax appointments are identifying an alarming spread of underinsurance, that we are now attempting to tackle, among other important issues. Sharon has been involved in processing a few big insurance claims for our clients recently, in Income Insurance, Total & Permanent Disablement and Trauma. This has clarified to us the absolute importance of insurance to you and your families. Our service extends to not only putting appropriate insurance in place, but also 'holding clients hands' and liaising with insurance providers to sometimes fight on behalf of the client to get a claim through in a more timely manner. If you would like to meet with Sharon either in Millicent, Mount Gambier or Naracoorte to discuss any of the following,

- Consolidating superannuation funds
- Contributions to super
- Income protection insurance
- Life & Total Permanent Disablement cover
- Trauma Insurance
- Investment advice
- Budgeting



Sharon Fox

please call 87334133 to set up an appointment.

Sharon is an authorized representative of Apogee
Financial Planning License number 230689



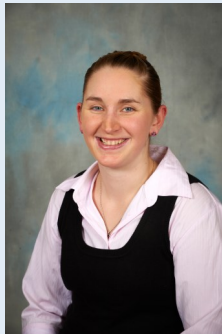
NBC MILLICENT



Kate Kelly

We have a new staff member in Millicent, Kate Kelly. Kate has been with us for 2 months in the role of Administration Officer part time. Kate is a local girl whose partner is a local fisherman, they have a young son and they live in Millicent.

Rex, Sharon, Amanda and Kate will farewell Amy next week who will be leaving us again for maternity leave for 6 months. We wish Amy, Josh and Emie all the best for the upcoming birth of their new baby, we are all very excited to meet the new addition to their family!



Amy Mason

Rex is currently consulting for Tax and Financial Planning in Millicent on Thursdays and Fridays. For an appointment with Rex in Millicent, please call 87334133.

SALE OF GENERAL INSURANCE

As all of our existing general insurance clients should know, we have now sold the General Insurance portion of our business. Clients with insurance held by CGU will now be serviced by Richard Ray Insurance Brokers in Millicent and Mount Gambier, who can be contacted on 87332144. The sale of CGU clients has allowed us to focus our business in the area of taxation and financial planning advice.

**38 GRAY STREET MOUNT
GAMBIER Terry Scott's Office**



Rex Whittaker



Karen Buchanan

Rex and Karen have been busy completing tax returns at 38 Gray Street. Rex consults Monday & Tuesday at Gray Street and Karen consults Wednesday, Thursday and Fridays. If you haven't yet had your tax return completed, now is a good time to call 87239822 to make an appointment, as the busy rush has settled down, and perhaps secure a refund before Christmas. Clients having their tax completed will have the option of a free Financial Health check, which may identify areas of advice that you may wish to discuss with our Financial Planner at an obligation free appointment. Rex is a CPA qualified Accountant, as well as a financial adviser. He also specialise in Self Managed Super Fund advice.

**4 DAVISON STREET MOUNT
GAMBIER FOR TAX**

Karen and Kathy have been flat out at Davison Street completing tax returns for clients that were last year H & R Block (Pauline Murray) clients. There are still a number of returns to complete at Davison Street, but now that the initial rush has slowed down, you should be able to make an appointment to suit quiet easily. Office hours for Davison street are now Tuesday to Thursday 9 to 5. Karen and Kathy will do 5pm appointments on request. Please call 87239822 Monday to Friday to make an appointment. Tax clients now receive a Free Financial Health Check when having their tax return completed.



Kathy Kotsovos



Karen Seymour