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Objective

To demonstrate a broad range of professional training, skills, abilities and experience available to assist where required.

Experience

Rod Wallbridge, Chartered Accountant

QLD

Sole Practitioner

July 2004 –
date

Moved back to Doonan, established a specialist Auditing, Business Management, Risk Management, Investigative and Insolvency practice, with local clients ranging from small to large and with some large Brisbane clients.

Rod Wallbridge, Chartered Accountant

QLD

Sole Practitioner

1st July, 2001

Sold my share of our partnership to my former partner, Cheryl Cook, and moved to Doonan, Queensland.

2001 – 2003

Finalised 2001 accounts for Adelaide clients and liaised with former partner re ATO lodgements.

Large multiple BAS's assignment for Brisbane Tax clients.

Audits of "small" APRA superannuation funds & large Charitable Trusts.

2003 – 2004

Six months+ sub contract work with Alison & Associates, Chartered Accountants, Maryborough with mostly audit work, including large Associations, Gaming Club Audits, Real Estate, Property, Motor Trader and Travel Agents trust account audits, and some tax assignments.

Community Activity

Sunshine Coast, QLD

2012 – 2013

Director of Noosa Biosphere Ltd

2004 – 2011

Member of various Committees for sons' College at Noosaville.

2009 – 2013

Member of the Social Board of Noosa Biosphere Ltd – Chairman 2011 - 2013.

2009 – 2011

Member Australian Accounting Standards Board Service Performance Reporting Advisor Panel.

2010 – 2014

Full member of the Australian Volunteer Coast Guard Association at QF5 – Coast Guard Noosa. Trained for and on completion of all necessary practical and theory subjects, carry out the duties as Radio Operator with shift responsibility for watch-keeping, monitoring and logging all vessel movements and carrying out SOP's for assists. Progressed through units for Competent Crew status.

Wallbridge & Cook,

Accountants, Business Advisers & Tax Agents

Adelaide SA

1999 – 2001

Partner

Promoted a staff member to Partner and trained her in managing a practice.

Researched, acquired, installed & commissioned new practice management, client accounting, ATO & ASIC software (HandiSoft suite).

Responsible for mostly MYOB and some Quick Books installation, set-up & training for clients for A New Tax System [GST] compliance

Prepared & presented Power-point GST seminars for clients.

General accounting and business advising to clients

Audits of Commercial and Not-For -Profit Entities (largest with a turnover of \$6m)

Experience (Continued) Rod Wallbridge, Chartered Accountant SA Sole Practitioner

- 1989 – 1999 Resigned from the Mann Judd Partnership to concentrate full-time on managing the orderly sale/closing down/winding up of the 15 companies with differing shareholders in a large client group (turnover >\$300m.) in financial difficulties, with operations in all States of Australia.
- Built up another successful practice, notwithstanding nine months off recovering from a nasty push-bike accident on 20th December, 1992 and without approaching my former Mann Judd clients.
- Carried out all the aspects of professional work in an accounting practice: accounting, tax, audit, liquidations, receiverships, business advising, investigations and Government and semi-government consultancies.
- Continued to lecture i.e.
- presented a paper "Maximising Wealth for your Retirement" to South Australian veterinarians, as part of the Continuing Veterinary Education programme of the Division of Veterinary & Biomedical Sciences – Murdoch University in November 1997;
 - presented 120 hours of lecture material – Ownership Structures / Cost, Profit & Breakeven / Budgeting / Taxation / Business Finance / Using Financial Reports -- to students over a six month period as part of the Small Business Management course for the Department of TAFE, SA in 1996;
 - presented a small business financial management paper to the Egg Industry National Convention in Adelaide in 1995,
 - presented a paper to the Motor Trades Association titled "I use a Chartered Accountant because..." for the ICAA Industry Breakfasts initiative in 1993. These successful breakfasts were an outcome of the collaboration between the ICAA & the ANZ Bank to present Small Business Seminars, negotiated by the Membership & Marketing Committee of the ICAA of SA of which I had been chairman for 4 years.

Community Activity Adelaide, SA

- 1992 – 1998 Member, then Committee Member then President of St Andrew's School, Walkerville P & F association, overseeing a complete re-organisation of the structure of it and the incorporation of two other parent groups into a functional and coherent whole.
- 1995 – 1998 Read newspapers for three hours per week and occasional serialised books on Radio 5RPH, Radio for the Print Handicapped.
- 1989 – 1992 Continued to hold office as Chairman of the AFCT and a Governor of the Adelaide Festival of Arts.

Mann Judd Adelaide, SA

- 1987 – 1989 **Partner**
- In 1987 I "merged" my sole practice with four former partners of the then KMG Hungerfords [which firm shortly afterwards merged with Peat Marwick Mitchell to become KPMG] and the five of us practiced as Mann Judd - SA.
- I continued work in accounting, auditing, taxation, insolvency and management advising for a broad range of clients and also learned some valuable lessons about partnerships, resigning in late 1989 to concentrate on a large client's work.

Community Activity Adelaide, SA

In early 1989, at the end of my term as Chairman of the Arts Finance Advisory Committee, the State Government appointed me as Chairman of the Adelaide Festival Centre Trust, the landlord of the Festival Centre in Adelaide. The Festival Centre Trust, in order to fill the halls, had been obliged to become an entrepreneur. Under my Chairmanship, through the "commercialisation" of its activities and the total revamp of its staffing & management structures, the AFCT reduced its dependence on Government funding from over 30% of its budget to less than 11% of an increased level of government support and took its gross t'over to >\$30m.

Experience (Continued) **Community Activity (continued)**

1987 – 1989
(continued)

I was concurrently appointed to the Board of Governors of the Adelaide Festival of Arts, the biennial Adelaide Arts Festival & was Deputy Chairman, to Mr Fergus Simpson, B.Com, MAICD, of the Finance sub-committee which set and monitored the \$12m budgets for each of the two Adelaide Festivals held in that time.

I held both these positions for four years.

MannJuddWallbridge
Sole Practitioner

Adelaide, SA & Darwin/Katherine, NT

1983 – 1987

In 1983, the Mann Judd National Association, a Second Tier National & International Chartered Accounting Firm required a Chartered Accounting firm to represent it in South Australia. The then State Registrar of the ICAA provided them with a list of suitable firms not otherwise representing national associations. The list consisted of reasonably large 3 to 5 partner firms and my sole practice. Following rigorous interviews, Mann Judd asked me to become their South Australian & Northern Territory representative firm. This was a considerable professional coup, which I happily accepted, and my practice operated in SA and NT as **MannJuddWallbridge**.

Provided technical material for the Mann Judd National Association client newsletter on a monthly basis.

Hosted a successful three day technical National Association Annual Conference in Adelaide, opened by the Premier and Treasurer, Mr John Bannon.

In 1985 I sold my Darwin practice and Katherine clients in order to concentrate on my SA clients and my interstate consultancy work.

I was an active member of the Institute of Chartered Accountant's Membership & Marketing Committee from 1986 to 1993, serving as Chairman for four years, organising, amongst other things, the first members Annual Formal Dinner to which spouses were invited and which also included a fashion parade.

1983 – 1987 **Community Activity**

Adelaide, SA

In 1985, in recognition of the work I was doing in the Arts Industry, the SA Government appointed me as its first independent Chairman of the Arts Grants Advisory Committee for two two-year terms. Duties included responsibility for reviewing all applications for funds from the \$30m annual Arts Grants budget by arts organisations and advising the Government Minister for the Arts & the Treasurer on the allocation of its grant monies to these bodies. This was a part-time appointment with a secretariat provided by the State Government.

From 1983 to 1985 I carried out the duties & responsibilities of Treasurer of the "SA Great!" campaign, a state-wide organisation set up by commerce & industry to promote the products, services and benefits of South Australia firms to a broad range of potential customers. I revamped the whole of the recording & reporting systems to provide the management committee with better information for decision-making and specifically to properly bring membership fees to income proportionately from commencement over the period of membership.

From 1985 to 1987 I was asked to join the Family Planning Association Board and took up the position as Treasurer and, in that capacity, redrafted the internal controls and recording and reporting systems and classifications. The Committee consisted of 26 representatives from various very interested interest groups and was, to say the least, unwieldy and I made that point at the table. After my stint as Treasurer I was asked to act as Facilitator / Mediator in the process of slimming down the Committee to a more workable 7 members whilst preserving the interests of the interest groups.

Experience (Continued) **Rod Wallbridge & Co.**
Sole Practitioner

Adelaide, SA & Darwin/Katherine, NT

1973 – 1983

Commenced practice as Rod Wallbridge & Co. Chartered Accountants in Adelaide on the 1st of April, 1973.

In 1976 I satisfied the requirements to become and was made a Fellow of the Institute of Chartered Accountants in Australia.

By 1983 I had established a second office in Darwin, also servicing clients in Katherine. The firm consisted of me as practitioner/principal and a total of 5 Professional qualified staff, 1 Computer operator, 3 Bookkeeping Support staff and 2 Administrative staff. The practice was based on tax and accounting work, with many audits and some creditors' voluntary liquidation and receivership work.

I lectured in accounting, business management and taxation for a variety of tertiary institutions in their "practical" faculties, i.e.

- the Industrial Design & Ceramics departments of the then Adelaide CAE (now University of SA),
- the aboriginal integration course at the University of Adelaide,
- the Institute of Chartered Accountants for its newly introduced Professional year,
- a private accountancy school preparing students for the previous ICAA collegiate exams,

My specialisation was in Management Accounting systems for Small to Medium Businesses, including goal setting, budget forecasting and weekly/monthly/quarterly reporting systems. This specialisation was further specialised in that I was able to capture the Arts Industry market and my manual weekly management reporting systems were, at one stage, made a condition of grant to Arts bodies from both State and Federal Governments and my Arts Management practice became Australia wide.

1973 – 1983 **Community Activity**

Adelaide, SA

I worked with the Arts Faculty at the University of South Australia to assist in the establishment of its Arts Management Degree course and subsequently lectured (part-time) at that faculty.

On my return from the UK, with knowledge gained there, I became involved in residents' rights, as one of the square mile of Adelaide's 1,200 residents at that time. I became the founding President of The Adelaide Residents' Society and, with a strong committee and community, removed the gerrymander in favour of businesses and, with increased residential voting power, changed the Adelaide City Plan to include residential renewal, culminating in the current high number of "inner City" residents in Adelaide.

1962 – 1973 **Rod Wallbridge**
Employee

Adelaide, SA /London, UK/Adelaide, SA

As a registered student and an active Chartered Accountants Students Society committee member, I gained good all-round experience in insolvency, general accounting, taxation and audit, working for a number of Adelaide accounting firms from 1962 to 1969, during which time I successfully completed the entrance examinations for the Institute of Chartered Accountants in Australia.

On being granted membership of the Institute, I went to London for two years, working as Audit Manager with an associated firm of my then Australian employer. Whilst in London, my clients were large audit assignments, including a Swiss Bank. Whilst managing the Sainsbury's Ltd. audit, I initiated the first comprehensive review in 100 years of the entire systems and management decision-making processes of this multi-billion £stg corporation, heading a small team of professional staff. This work resulted in significant cost savings to the client and was so well received that the CEO, the Hon (now Lord) Simon Sainsbury, requested my employer to retain my services in London when my "exchange" term was up. However, I returned to employment in SA.

Experience

(Continued)
1962 – 1973
(continued)

I was appointed Audit Manager with Peat Marwick Mitchell (now KPMG) for a year in their audit division. I held responsibility for the audits of some major manufacturing and industrial clients, reporting directly to the audit partners.

Education

Professional Qualifications Held

Fellow of the Institute of Chartered Accountants in Australia.

former Member of the Australian Society of CPA's

ICAA Practising Certificate No 2779 since its introduction in October, 1973.

Registered Tax Agent No 61321, from 1973 to 1999.

Registered Company Auditor No 5628, since 1973

Registered Company Liquidator No 5745 since 1975

Registered Company Agent No 23989 since its introduction in 1995

Ongoing Continuing Professional Education since qualification.

In view of my specialist registrations, I currently undertake a minimum of 40 hours per annum of CPE in order to continue to qualify to hold my Practising Certificate.

This takes the form of an equal combination of approved, structured and prescribed technical development sessions and self-paced reading and research divided more or less equally between Accounting, Audit, Taxation and Insolvency.

1963–1969

Institute of Chartered Accountants

SA

Completed the National work experience and collegiate system examination requirements to qualify as a member of the Institute of Chartered Accountants., graduating with top awards in many subjects.

1948-1960

Primary & Secondary Schools

SA

Started Primary School at four years old and completed to Leaving Honours (Year 12 equivalent) with some credits & one distinction on the way.

Passed Intermediate (Year 10 equivalent) Music at the AMEB exams.

Sporting History

Tennis, cricket & athletics [High jump, Long jump, Triple Jump, Shot-putt, hurdles, short and long distance running] at School

Learnt to swim and trained at Port Augusta in 1959 and competed in State Championships age group competition in 1960, with later surfing and SCUBA diving – PADI C card.

Played centre for Alice Springs in the NT Basketball Competition 1961

Played ruckman/back pocket for Easts in the Alice Springs Australian Rules Competition 1961.

Played AFL football for the Sturt Football Club in the SANFL 1962 – 1963.

Played four quarters ruckman for Saddleworth in SA's Mid-North Australian Rules Competition 1964/5

Rowed for the Adelaide Rowing Club from 1966 to 1968.

Trained as part of the SA Kings Cup Rowing Squad, 1968/9

On my return to Australia in 1971, I commenced sailing as crew in the two-man 505 International Class Yacht at Brighton Seacliff Yacht Club and went on to represent Australia in the Pacific Championships in 1974 and the Pacific and World Championships in 1975,

Joined the Triumph Sports Owners' Association SA in 1972 and held the positions of Monthly Newsletter editor, Competition Director & Vice President 'till 1979. I successfully competed in CAMS approved motor races and Club events in TR3A's, a TR5, a MkI & a MkII 2.5PI Saloon.

Obtained a VFR Private Pilot's licence in 1973/4, with constant speed propeller and retractable undercarriage endorsements.

Played State Pennant Squash 1974 – 1983, reaching B Grade,

1979 Acquired a Hartley TS16 and raced it at Brighton & Seacliff Yacht Club and sailed it on TS16 Association cruises,

Took up running 1979 -1985, competing in long-distance races, i.e. half marathons,

Assisted in constructing & rigging of racing yacht "Dictator" for Mr Richard Fidock, AO.

Crewed as mainsheet hand on the Adelaide - Pt Lincoln Overnight Race & Pt Lincoln Race Week 1988,

In 1985, bad knees forced me into cycling and I was an active member of the "Tour d'Adelaide" cycling club.

Current Interests

Beer brewing, Bike riding, Boating, Camping, Carpentry, Computers, Cooking, Fishing, Gardening, Hunting, Photography, Reading, Surfing, Swimming and Ukulele playing.