

Capability Statement

Your partners in business success



Next Dimension
ACCOUNTING



INTRODUCTORY SUMMARY

Next Dimension Accounting was established in 2021 to provide outsourced financial solutions to Australian small to medium size businesses. Our approach is technology-driven and client focused, empowering our clients to concentrate on their key strengths, adapt swiftly to change and prosper.

Next Dimension continues to receive accolades for its services, and our experienced team has produced excellent results for our clients. In a few short years, we have achieved our goal of being known as an expert provider of accounts services for Australian small-to-medium size businesses.

OUR MISSION

Our mission is to empower our clients to make informed decisions and achieve lasting success.



Accounting
expertise



Tech-savvy
team



Innovative
solutions



Trusted
advisers

ABOUT NEXT DIMENSION ACCOUNTING

Next Dimension Accounting (NDA) is a team of expert accountants who provide business analysis, insights, and advice that enable strategic growth. With a focus on delivering timely and relevant business information, our mission is to empower our clients to make informed decisions and achieve lasting success.

NDA was established to lead and innovate in the accounting space. Our clients represent many small-to-medium size businesses.

NDA provides highly skilled services in the areas of bookkeeping, payroll, reporting, data analysis, financial modelling, taxation compliance, and advice, along with an On Demand CFO service.

As Xero experts, we seamlessly facilitate transitions from your current accounting system to Xero, leveraging the latest software and AI-driven processes to enhance efficiency.

We prioritise personalised service, tailoring our solutions to meet each client's unique needs.

Our service provides exceptional value for money, enabling businesses to optimise their financial resources effectively.

We offer innovative solutions to help our clients adapt swiftly to changing market dynamics and achieve sustained growth.

EXPERIENCE

Our team has decades of experience in the accounting industry. We have served numerous clients during our journey and are proud to continue our support.

Utilising cutting-edge technologies such as Xero, ApprovalMax, DEXT, Weel, Power BI, Deputy, XBert, plus many more, we offer secure data storage, real-time access and improved collaboration for our clients.

We are committed to continuous learning and development, ensuring our team remains at the forefront of industry trends and best practices.

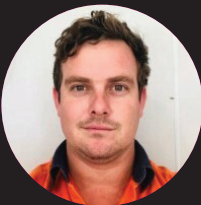
We have accumulated valuable experience working with business clients from a wide range of industries.

We have been recognised for our achievements in the accounting industry and were finalists in the Australian Accounting Awards for the Start-up Firm of the Year, Fast-Growing Firm of the Year, and Boutique Firm of the Year (Less Than 20 Employees) categories in 2023. In 2024, we were also finalists in the Boutique Firm of the Year (Less Than 20 Employees) and Marketing Program of the Year categories.

Small to Medium Business Experience

- We specialise in serving medium scale businesses (typically \$1M to \$ 20M turnover p.a.). We understand the needs of business owners for robust systems and sustainable growth, as well as consolidation and expansion strategies, along with their challenges.
- We work with businesses to:
- Minimise outlay through cost-effective accounting technology
 - Prepare Power BI Dashboards for clients to maximise their efficiency
 - Ensure effective reporting to management, CEO, Board, and shareholders
 - Satisfy ATO and compliance requirements
 - Strategise for future growth and stability with outsourced CFO services
 - Assist with financial audits

“ Partnering with Next Dimension Accounting has brought clarity and peace of mind to our financial management. Their trusted expertise has made a tangible difference, enabling us to focus on growth without distractions. ”



Jake Edwards
Co-Owner of Goldward Civil

PRODUCTS AND SERVICES

Next Dimension provides the following services to business clients.



Bookkeeping & Payroll

We introduce bookkeeping services that will transform the way you operate.

- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- BAS Preparation and Lodgement
- Budgeting and Forecasting
- Debtor Management
- Expense Reporting
- Fixed Asset Management
- General Bookkeeping
- Leave Management
- Payroll Processing
- Single Touch Payroll
- Tech Stack review
- Xero Add On advice
- Xero Conversion and Setup
- Xero Optimisation



On Demand CFO

We strengthen outcomes and seize opportunities with professional advice.

- Advisory Services
- Audit Liaison
- Board Finance Training
- Board Meeting Representation
- Budgeting and Forecasting
- Cash Flow Management
- Cost Management
- Financial Analysis
- Financial Modelling
- Financial Reporting
- KPI Development
- Mergers and Acquisitions
- Risk Management
- Scenario Analysis
- Stakeholder Reporting
- Strategic Planning
- Systems Analysis
- Unit Costing



Reporting

We produce insightful financial reporting that shapes success.

- ASIC Agent
- Audit Preparation
- Benchmarking Reporting
- Board Reporting
- Compliance Reporting
- Financial Dashboards
- Financial Statements
- KPI Monitoring
- Management Reporting
- Power BI – Interactive Data Visualisations
- Project Reporting
- Registered Office
- Segment Reporting
- State Based Reporting
- Variance Analysis



Tax Services

We minimise risk, satisfy compliance and maximise profit.

- BAS and IAS
- Capital Gains Tax
- Fringe Benefits Tax
- Goods and Services Tax
- Income Tax
- Payroll Tax
- Salary Sacrifice
- Self Managed Superfunds
- Small Business Tax Concessions
- Tax Advice
- Tax Agent
- Tax Audit Assistance
- Tax Planning
- Tax Structuring

CLIENTS

Our outsourced accounting team brings a deep understanding of the business landscape and the unique challenges faced at every stage of growth.

With extensive experience across a wide range of industries, we offer financial expertise that adapts to the specific needs of your business, ensuring sound financial management and strategic support.

Whether you're launching a startup, navigating growth, or managing a mature company, our team delivers tailored solutions that streamline financial processes and provide clear, actionable insights.

Business types:



Startup



Growth



Maturity



Exit

Business clients:

Artisan Switchboards

C M S Electrical Services

Cassidy's Automotive

Coleman Group

Complete Fabrication Solutions

Goldward Civil

Goodwill Wine

Hazelgrove Early Education and Childcare, Baulkham Hills

Information Proprietary Limited

Kamra International

Oberon Construction

Rail Planning Services

“ Running a business can feel isolating, but Next Dimension Accounting has provided the support I needed to make confident decisions. Their tax and business advice have been invaluable, ensuring I never feel alone while navigating complex challenges. ”



Hugh Johnston
Owner of Broulee Homes

ACHIEVEMENTS AND CLIENT RESULTS

Case study: Rollex Civil – Cloud accounting helps grow the business

Rollex Civil is a growing company with a busy fleet of drills, trucks and excavators. Keeping up with the accounts is a task made much easier since the Next Dimension team began providing them with an outsourced accounting service.

Demands on Australian small to medium businesses like Rollex Civil have never been greater. There is more red tape to comply with in most industries. Tax, BAS, payroll and other financial reporting must include far more detail. As markets fluctuate and businesses adapt, it is critical that owners and managers stay on top of the daily financial position of their business and can access current figures quickly.

Next Dimension has been working with Rollex Civil as an outsourced accounts service. The goal was to streamline their accounting processes and set up financial systems that allow the owners and manager to save valuable time and easily monitor their financial position.

The company was in a good position to expand and prosper, but the realities of growth presented the company's management team with a paradox. It meant they needed to spend more time focused on operations in the field leaving less time to manage the company's books. Yet to successfully manage their expansion the owners needed more in-depth analysis of their finances.

Rollex Civil's new accounts system utilises cloud-based accounting including Xero, as well as Receipt Bank to easily track receipts and expenses.

Financial tracking now shows what is happening with cashflow in real time and breaks down the costs. "If you know where your money is going, you can do something about it," says Operations Manager Peter Rix, adding, "if there are any discrepancies or expenses that are not quite right, we can fix it up before the end of the month."

Monthly reports make it easier for Peter to thoroughly review the expenses, returns and profit margins and keep the owners aware of the financial health of the business.

Under the outsourced accounting service arrangements, Peter liaises with an accountant from the Next Dimension team. He also has access to other members of the Next Dimension team and their knowledge of business accounting and can consult them regarding tax and other matters.

Peter notes that the professionalism of the Next Dimension team means he doesn't have to second guess whether they have done things right from the Tax Office's point of view. He adds, "It's very reassuring they are there doing it right. From a regulatory point of view, it certainly gives us a lot of comfort."

The establishment of more efficient accounting processes has helped take the business management to the next level.

Without having to do the accounts or supervise an on-staff bookkeeper, the management have been freed up to focus on other aspects of the business. They have also saved on staffing costs. Peter rates highly the skills provided by the Next Dimension team and the "fantastic service they offer".

“ We have no hesitation in recommending NDA - they certainly do go above and beyond and are an asset to us at Rollex Civil. We look forward to working with them for many more years to come. ”

Roland Collins,
Owner of Rollex Civil



HOW WE WORK

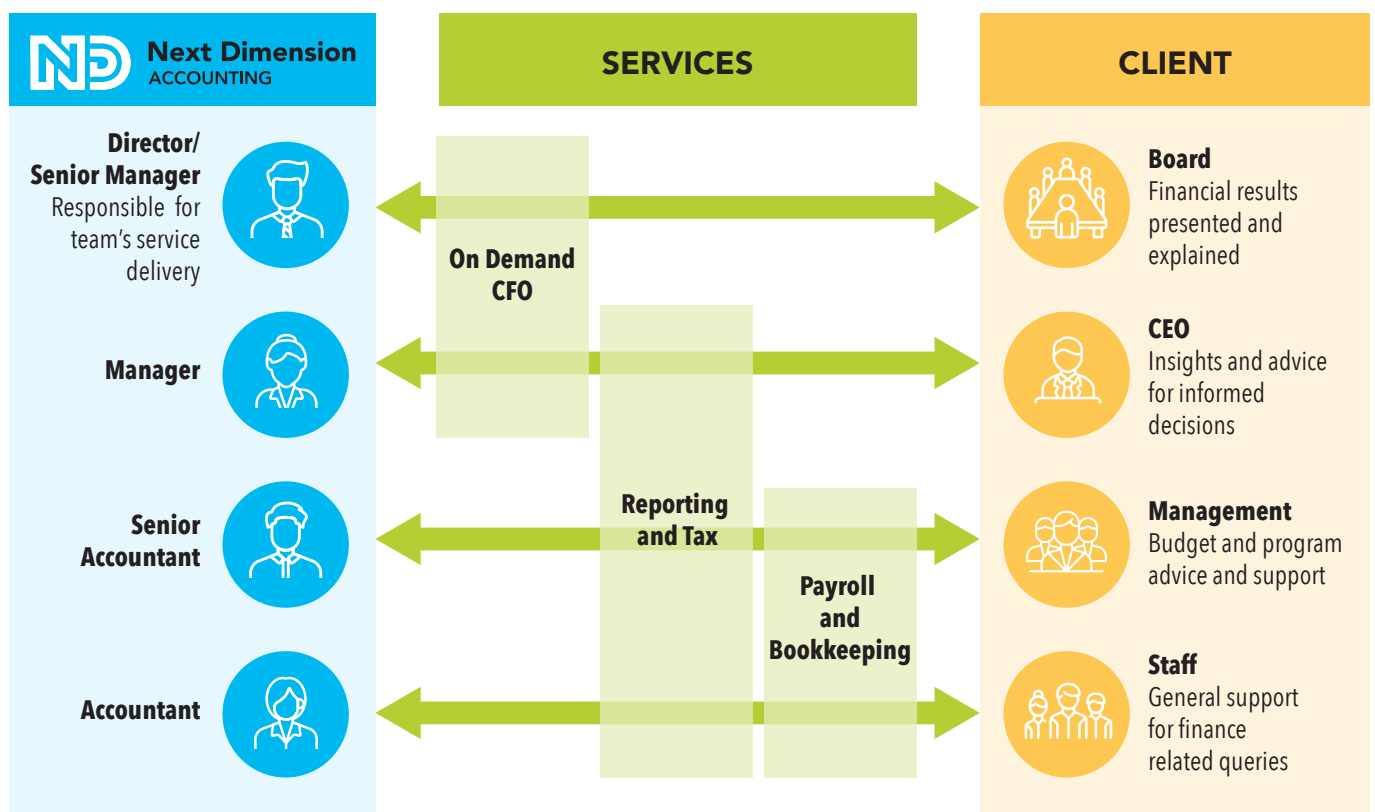
At Next Dimension Accounting, our team of experienced accountants, bookkeepers, and support staff works alongside clients as partners. We are committed to delivering tailored solutions that help organisations stay focused on their objectives, mission and activities.

Your Next Dimension Accounting Support Team

At NDA, we provide timely and easily understandable information to decision-makers and their organisations, enabling them to make informed decisions and succeed.

Our multi-dimensional support team helps mitigate the risk of key person dependency within our clients' organisations.

We work across various touchpoints, offering independent expert advice to boards to assist them in their oversight duties. Our team also supports CEOs and Senior Management by helping them plan, build, and meet all compliance requirements. Internal processes and operations, including reporting, tax, payroll, and bookkeeping, are seamlessly supported to boost compliance and operational efficiency.



SENIOR LEADERSHIP TEAM QUALIFICATIONS AND COMPETENCIES

Our team comprises qualified and experienced accountants, including professionals who are Registered Tax Agents holding CA or CPA certifications. We hold all necessary insurance and are committed to continuous learning and development, ensuring our team remains at the forefront of industry trends and best practices.

The Next Dimension Accounting team is led by:

Founder and Managing Director

Brendan Lucas CA

Brendan's approach is shaped by his 20 years+ commercial experience.

From nine years at PwC, advising private business owners on complex tax and business issues to his expertise guiding early-stage businesses or those looking to expand.

As a tech-savvy accountant, he excels in leveraging technology to streamline accounting processes, reduce costs, and enhance the timeliness of financial reporting to facilitate better decision-making.

His adeptness at numerical analysis and technological applications empowers clients to perform necessary financial analyses much more efficiently.

With his comprehensive experience and strategic insight into growth, team development, and innovation, Brendan is well-equipped to help businesses stand out and achieve their goals in a competitive landscape.

Formal qualifications:

Chartered Accountant

Bachelor of Commerce Accounting

Registered Tax Agent



Professional Memberships and Community Support



Our Business Awards



Client Services Director

Joanne Fahd CA



Jo is a seasoned professional with over 30 years of experience across public practice, banking, financial services, and commerce. Her extensive background working with diverse business sectors equips her with the knowledge and expertise to provide comprehensive support to her clients.

With first-hand industry insight, Jo understands the unique challenges and opportunities businesses face. She is passionate about helping clients navigate financial complexities, streamline operations, and maximise their financial potential.

As a trusted partner, Jo delivers personalised attention and strategic guidance tailored to each client's needs, fostering sustainable business growth and long-term stability. Her support enables business owners to shift their focus from accounting and tax concerns to unlocking their company's full potential.

Formal qualifications:

Chartered Accountant & Registered Tax Agent
Bachelor of Business

Senior Manager

Tina Webb CA



Tina has a strong passion for numbers and analysis, backed by 25+ years of experience working with a diverse range of business clients. She collaborates with cross-functional teams to deliver practical, results-driven solutions that support growth, operational efficiency and long-term success.

Her expertise spans various sectors, having held finance and sales roles at Unilever, and she currently volunteers as the Treasurer for her local football club.

Business clients benefit from Tina's astute guidance on enhancing their processes through the use of financial dashboards, automation and effective accounting.

She is dedicated to providing tailored insights that enable clients to optimise their financial performance, simplify operations and reach their goals with confidence.

Formal qualifications:

Chartered Accountant & Registered Tax Agent
Bachelor of Commerce

Technology

Next Dimension is a technology-focused company that streamlines processes to ensure your business operations are cost-efficient, accurate and compliant. We have the expertise to unlock the potential of data to help you manage the future.

Some of the most valuable tools in our technology toolkit include:

Some of the Apps we work with:





**We value your interest in Next Dimension Accounting.
Please contact us for further information.**

Call Us: 02 8518 1101

Email: hello@nextda.com.au

Proudly servicing clients across Australia