



## **CORPORATE PROFILE**

### ***Key Personnel & Background:***

**David Wallace:** Bachelor of Business, Certified Practising Accountant, Justice of the Peace, with over 30 years experience in the aged care field.  
**(Director)**

**Peter Mackinnon:** Fellow of the Australian Society of Certified Practising Accountants and Tax Agent, with over 25 years experience in the aged care field.  
**(Director)**

Management services and advice provided to operators of Nursing Homes, Hostels, Retirement Village and community care services throughout New South Wales and interstate.

Clients have ranged from small single site rural aged care operators through to organisations that operate multiple sites and services in both the not-for-profit and for-profit sectors. Services have also been provided directly to Federal and State Government Departments as well as local Government.

### ***Services:***

- We are involved in all aspects of the Aged Care field providing such services as:-
  - ♦ Feasibility studies for new and redevelopment ventures
  - ♦ Operational management advice & assistance
  - ♦ Operational/Financial reviews
  - ♦ Amalgamation/Partnership advice and assistance
  - ♦ Overseeing development and building of aged care facilities
  - ♦ Continuing advice services
  - ♦ Strategic Planning and needs analysis
  - ♦ Aged Care Approvals Round Applications (Residential, Community and Capital Grants)
  - ♦ Workshops/Seminars covering all aspects of Residential Aged Care Management & Funding have been undertaken on behalf of the various State Aged Services Associations, large not-for-profit groups and the Commonwealth Government. Some of these include:-
    - Financial Planning Under the New Structural Reforms.
    - Residential Care, Financial Management, Budgeting and Performance.
    - Aged Care Management & Funding for Boards of Management & Senior Executives.
    - Aged Care prudential compliance
    - Financial options for Long Term Residential Aged Care survival
    - Understanding the ACFI funding charges

### ***Clients:***

- Our involvement with members of the various State Aged Services Associations extends for a period of 20 years and includes briefs with many member Organisations.
- Aged Care expertise recognised by Federal, State and local Government, with appointments to undertake major review projects.
- The majority of specific project review work undertaken is on the basis of an agreed fee for the service, which covers all costs including travel and accommodation. If the scope of services required is unable to be specified, an hourly rate is agreed upon.

- For many Aged Care clients a continuing advice service is provided. This may include, for example, budget preparation and monitoring, visits to discuss operational/funding matters, availability at all times for advice and problem solving. The package of services is tailored to meet the client's requirements. These arrangements are generally based upon an agreed annual fee payable by monthly instalment.
- Major consultancy project clients include Australian Department of Health & Ageing, NSW Health Department, United Protestant Association of NSW, Sisters of Nazareth, Uniting Care NSW, Snowy River Council, Catholic Aged Care Sydney, St Basils Homes, Benevolent Society, Anglicare (Sydney & Canberra), The INS Group and Wesley Mission.

Smaller Project clients, many rural based, include Crookwell/Taralga Aged Care, Storm Village (Taree), Woolgoolga & District Aged Care (Coffs Harbour), St Cuthberts Village (Tweed Heads), Maranatha House (Wellington), Bega & District Aged Care and Garden Village (Port Macquarie).

Listed below are some of the continuing advice clients for whom management assistance is currently provided:

- Hawkesbury Community & RSL Homes Limited, Richmond, NSW (Nursing Home & Self Care Units).
- Australian Chinese & Descendants Mutual Association Hostel, Canley Vale, NSW – Hostel (including development/building)
- Indo-Chinese Elderly Hostel, Bonnyrigg, NSW – Hostel
- Storm Retirement Village, Taree, NSW (Nursing Home, Hostels & CACP's).
- Dougherty Villa Hostel, Grafton, NSW.
- Avondale Retirement Village, Cooranbong, NSW – Nursing Home, Hostels & Self Care Units.
- Linburn Nursing Home, Burwood, NSW

**Referees:**

Some referees you may care to contact:-

Ms Jill Pretty	(02) 9799-0900	Executive Director, Aged & Community Services Assn of NSW & ACT Inc.
Mr. Paul Miller	(02) 9592-4665	Chief Executive Officer, Rosary Village, Yennora, NSW
Ms. Trudi Hodges	(08) 9497-3200	Chief Executive Officer, Dale Cottages Inc, Armadale, WA.
Ms Kimberley Talbot	(02) 4578 2966	Group Chief Executive Officer, Hawkesbury Living Pty Ltd, Richmond, NSW
Mr Steve Walkerden	(02) 9487 1338	General Manager, UPA (United Protestant Association of NSW Ltd), Wahroonga, NSW

For a list of projects undertaken and further references, please contact us on:



David Wallace

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