



smb
ACCOUNTING
Franchise
PROSPECTUS

A new kind
of accounting

Welcome to SMB Accounting

SMB Accounting is a dynamic and innovative accounting firm with **over 30 years of expertise** in delivering trusted financial solutions.

SMB Accounting is built on the philosophy of combining boutique accounting expertise with the latest technology to empower SME business owners financially.

By automating routine tasks, SMB Accounting delivers bespoke, proactive advice that helps clients focus on growing their businesses while maintaining peace of mind.

Our all-in-one bookkeeping, accounting and tax packages are designed to create an effective structure for managing your finances so you can focus on growing your business instead of worrying about money.



Operating across multiple branches in Southeast Queensland, SMB Accounting continues to expand, driven by its mission to help passionate business owners feel confident and financially empowered.

What makes SMB Accounting different?

We provide the right balance between simplicity and sophistication in accounting services for small and medium businesses.



Our Founder

SMB Accounting is a family-owned business founded by Stephen Blake in 1993 as Stephen Blake Accountants.

In 2007 Stephen rebranded as SMB Accounting on the Sunshine Coast. He first reimagined how accounting could be reinvented to better serve small and medium businesses.

Since 2007, SMB has opened additional offices in Brisbane, Fraser Coast and Melbourne, with the vision to help as many passionate business owners as possible feel confident and be at ease knowing their finances are taken care of.

In 2019, Stephen revitalised the brand with a subscription-based business model, making premium accounting services, once reserved for large corporations, affordable and accessible to SMEs.

This innovative approach moves away from traditional, transactional accounting methods by offering clients continuous support and real-time financial insights.



At the core of SMB's model is its monthly billing structure, which ensures predictable and affordable pricing for clients.

Why Partner with us

SMB Accounting's franchise model offers a suite of benefits and resources to support you in setting up your franchise and achieving lasting success.



Marketing

We offer Franchise Partners the option of National Office managing all digital marketing using our robust social media marketing strategy that has seen the company grow 400% in the past 5 years.



Cutting-Edge Tech

Our software streamlines your accounting operations, while our website and intranet management keeps your online presence professional, updated and responsive to clients' needs.



National Office Support

As well as ongoing training and support, National Office offers a dedicated call centre, regular quality control and initial fit-out and leasing support to help you hit the ground running in your new SMB location.



Recurring Revenue

Thanks to our revolutionary subscription model, you'll retain a high number of clients and generate a steady income from monthly billing for our services and our industry partners (Xero).

Our Clients

We are passionate people who feel like we're doing more than just a job.

SMB Accounting proudly supports a dynamic and growing client base, catering to the unique needs of small and medium-sized enterprises (SMEs). From NDIS contractors to independent tradespeople, our clients rely on SMB for proactive financial guidance that empowers their businesses to thrive.

Currently, 1 in 4 clients operates within the NDIS sector, a market with enormous potential for growth.

While many others are tradespeople who are beginning their journey as contractors, typically earning \$100,000 to \$150,000 annually.

These entrepreneurs are the backbone of Australia's economy, and they choose SMB for our transparent, tech-driven approach that delivers big-firm expertise at a price tailored for small businesses.

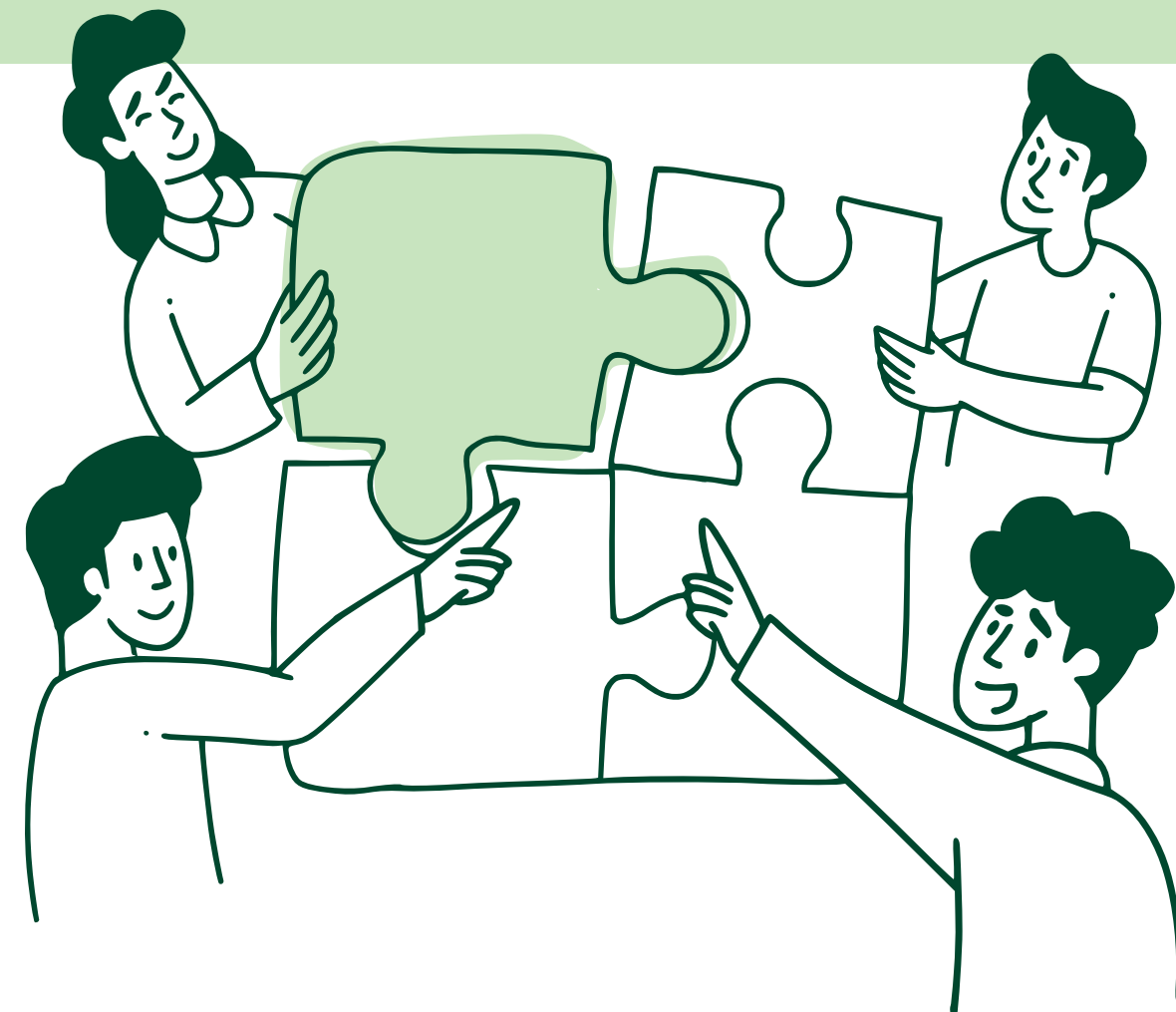


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Growth in Demand

As new markets continue emerging and business owners seek financial clarity and confidence, we're proud to be the trusted partner helping them unlock their potential.

With limited competition and a clear advantage in pricing and service delivery, SMB is well-positioned to capture market share and build a robust presence across the state.



Training and Support



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Initial Training

Your SMB Accounting journey will begin with 2-3 days of training in SMB processes, services, and marketing at our Sunshine Coast location.

Launch Marketing Support

To maximise the impact of your launch, we will help you advertise in advance to gain foundation members who are ready to subscribe when you start.

Life at SMB

Your life at SMB will be an exciting mix of accounting and franchise management, delivering first-class accounting services that keep your clients retained and office busy!

In a typical day, you'll be responsible for:

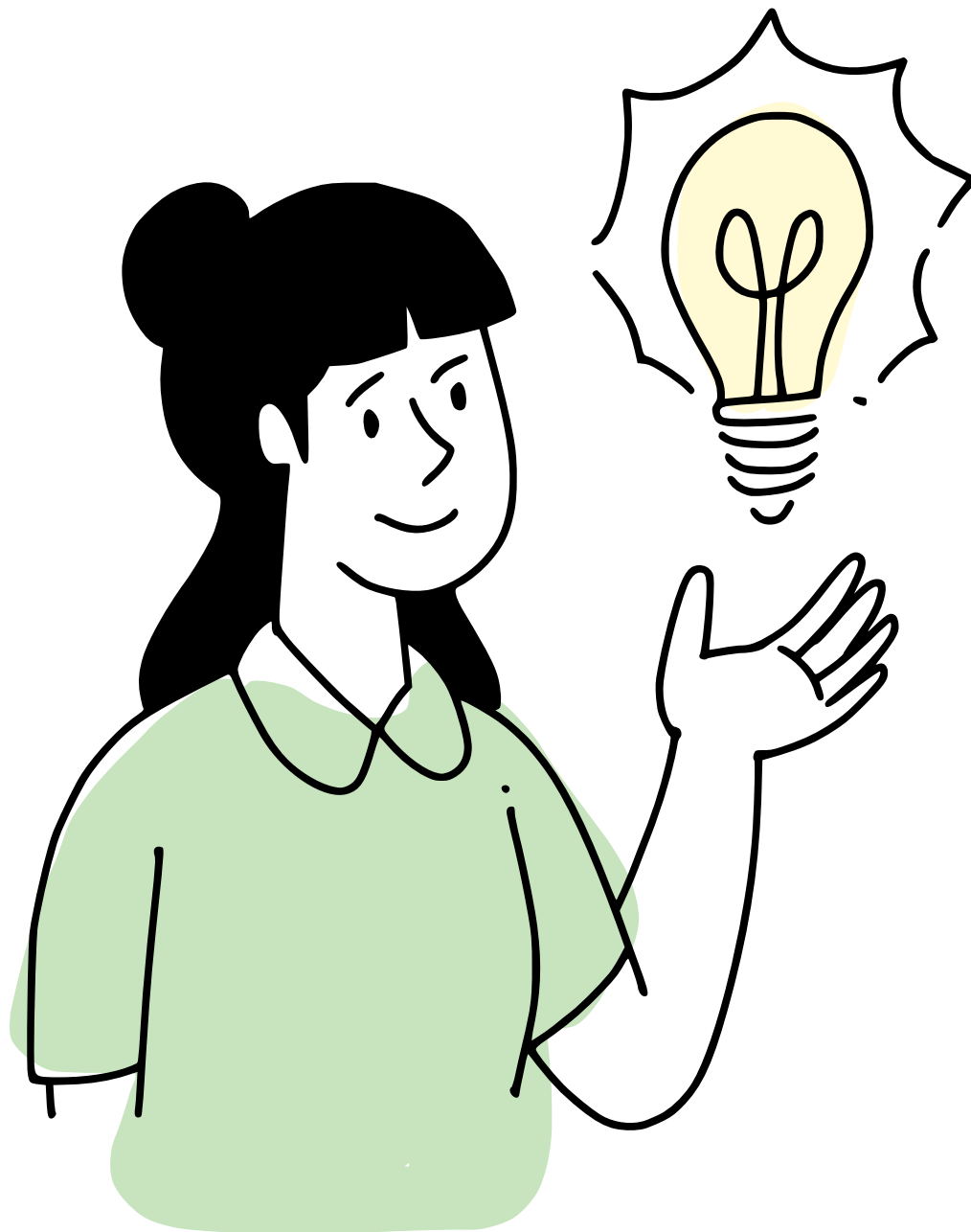
- Meeting clients
- Opening and closing the office
- Maintaining the office
- Accounting
- Local marketing
- Following leads
- Billing and administration



Technology

- Our CRM, **Hubspot** integrates with Facebook, livechat and our website, streamlining your administration and customer care.
- At SMB, we have developed our own proprietary app, **Phunl**, which works similarly to Dext. Phunl makes it easy for you and your clients to document and track billing expenses with the simple click of a button.
- Our partnership with **Xero** enables Franchise Partners to streamline operations, optimise efficiency, and drive profitability while delivering exceptional value to clients as it is included as part of the subscription offer.

FAQs



How long is the Franchise Term?

The standard term is an initial period of 5 years and 2 further terms of 5 years (15 years total).

What financial details will I get?

A closer look at our financials is provided later in the application process. In the meantime, we have provided some initial and ongoing figures as a guide.

How long will it take before I am ready to operate my Franchise?

We estimate from the time you sign the agreement to when you are ready to launch is approximately 1 week.

Who looks after advertising my territory?

Franchise Partners are given the freedom to market to their customers at an organic and local area level. National advertising and marketing campaigns are organised through Head Office for efficiencies and cost advantages.

How do territories work?

Your territory is exclusive, which means you are the only Franchise Partner who can advertise and market in your area.

Investment



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Initial Franchise Fee

\$30,000



Royalty Fee

*8 - 12%

*Reduced fee applies on monthly revenue threshold



Launch Marketing Fee

\$4,500

3 month advertising campaign



Training Fee

\$5,000



Local Marketing

\$500 per month for 12 months

Reviewed annually with Franchisor



While every effort has been made to ensure the accuracy of the information provided in this document, the Franchisor disclaims liability for inaccuracies. The projected establishment costs provided in this document are based on reasonable assumptions derived from our experience in operating this type of business. All costs shown exclude GST.

Step into the future of accounting with SMB?

Become part of our move to make high-quality, tech-powered accounting accessible for small and medium sized business.



BOOK A CALL

e: franchise@smbaccounting.com.au



Boutique accounting, supercharged by tech.
Designed for small and medium business.



Empowering Small Businesses, One Balance Sheet at a Time