

MARK HOLTON

SPEAKER - CONSULTANT - COACH

Mark Holton is one of Australia's most respected trainers and presenters specialising in the business and financial services sector.



SPEAKER KIT

2019

www.markholton.com.au

MARK HOLTON

Mark Holton has more than 35 years' experience as an FCPA Accountant and Tax Agent in practice. Mark is the Managing Director of Dynamic Taxation and Training Services and a Director of Smithink.

Mark has developed specialised skills in corporate presentations and training with extensive experience in both private and public sector industries in Australia, New Zealand, United Kingdom and North America.

He is also a respected consultant in taxation and business management, in particular value added services implementation and administration using key business advisory systems.

Mark holds a Masters of Commerce Degree as well as several post graduate qualifications in accounting and management. He also has a Degree in Adult Education and an Advance Diploma of Financial Planning.

Mark is a Board member and Honorary Treasurer of Ronald McDonald House Greater Western Sydney and a Board Member of Ronald McDonald Charities Australia and Bendigo Bank East Gosford NSW. He is the Founding Chairman and Director of Finance of the NSW Central Coast Academy of Sport.

Mark has delivered corporate presentations and training to a range of audiences, from one-on-one sessions to large professional associations.

His ability to engage his audience, his passion for knowledge and his capacity to communicate complex systems in simple terms make him a leader in his field. His advice is valued by his clients, his peers and the many community organisations that he assists.

Mark is a much sought after speaker for seminars, conferences and other functions. He is able to successfully deliver a positive message using his extensive business knowledge, anecdotes and his unique sense of humour.

He has delivered presentations to many organisations both large and small, in Australia, New Zealand, Canada, United Kingdom and the United States. He is a confident and competent presenter who draws upon a wealth of business and financial knowledge blended with practical experience to deliver his message.

“Mark is a true pioneer in the field of training financial advisors how to provide high-quality business advisory services to their clients. He teaches you how to look at your business in a whole new (and more profitable) way. His high energy and enthusiasm make him a dynamic and engaging presenter.”

David Straughan, CA
MacGillivray Accountants
Toronto Canada



PRESENTATION TOPICS

1. UNLOCKING YOUR PRACTICE'S POTENTIAL

How do professional service firms re-focus from compliance services to value-added reliance services? Mark shares his innovative process that includes insight on the correct firm structure, turning numbers into knowledge, action planning and identifying your clients' additional needs.

2. ADVISORY SOLUTIONS UPDATE

With a market full of business advisory solutions, selecting the most appropriate can be a challenge. This session will consider the available options and will highlight findings from the Smithink Accounting Firm Technology Survey on the successful delivery of business advisory services.

3. MISTAKE-FREE IMPLEMENTATIONS

What are the common mistakes made by professional service firms when undertaking business advisory work? Mark shows you how to avoid these key pitfalls, covering issues such as commitment and capacity, staff selection, equipping a Business Advisory Champion and finding the right clients to work with.

4. BECOMING A FINANCIAL STORYTELLER

Today's consultant or coach must provide high-level advisory services as well as simple accounts management. Learn how to be a proficient storyteller, extracting meaning from the numbers and helping clients understand their financial story, using web-based techniques like the 4 Chapters, the Power of One and the 3 Big Cash Flow measures.

5. RUNNING THE IDEAL BOARD OF ADVICE MEETING

A quarterly Board of Advice client meeting is the "low hanging fruit" opportunity that all accounting firms can maximise. In this session Mark shows how to deliver high-value meetings with a structured approach and engaging content that builds client accountability.

6. BUILDING EXCEPTIONAL CUSTOMER SERVICE

Recently returned from the Exceptional Leaders, Recruitment Selection + Training and Customer Service programs at Disney at Disney University in Anaheim, California, Mark shares his insights on the hugely successful Disney management model of "on stage and off stage" service delivery and "over managing" through an attention to detail that drives success.

7. GENERATING PROFIT OUT OF COMPLIANCE

Maximise opportunities to deliver consulting and planning services based on the backbone of compliance work. Mark will illustrate how you can build growth into your business with financial performance analysis, forecasts and projections, measured futures business models and 'what-if' scenarios to help clients establish clear objectives.

8. SEEING THE FINANCIAL IMPACT OF KEY DECISIONS BEFORE YOU MAKE THEM

Being in business is a constant battle of key decision making - should I or should I not? Do I commit? This session will show you the impact of key financial decisions before they are made. Any debt or credit? You must know in advance!

9. HOW TO GENERATE REFERRAL BUSINESS

All the research highlights that referrals are the mainstay of any companies business development, yet many firms do not have the processes and haven't developed the skills to optimise their referrals. This session will highlight how referrals can be optimised and provide practical steps that can be implemented immediately to improve referral performance.

10. HOW TO CREATE GREAT CONVERSATIONS WITH CUSTOMERS

The key to building a long term trusted relationship with a customer is to develop the skills to have quality client conversations. Conversations that unlock a client's deep-seated concerns about their business, their family and their finances provides the platform for you to build long term relationships and expand your service offerings.

EXPERIENCE & KNOWLEDGE

Mark is a lively and entertaining speaker, whether as a key-note addressing large audiences, the facilitator of a Partner Retreat, or the leader of Professional Development course. His engaging speaking style means that his audiences are always alert and entertained at his events.

For over 35 years Mark has been involved in and around the public accounting profession, and he incorporates many real-life examples in his speaking events and seminars. When it comes to the public accounting scene, it's unlikely you'll find a more knowledgeable speaker.

WHAT YOU GET WITH MARK

With Mark Holton on your speakers' program, your delegates are treated to a rare and worthwhile experience: the insights of an accounting business specialist, with personality, humour and skills in educating as well as engaging his audience.

If you want attendees to leave your event with smiles on their faces and the commitment to invite others, you need to secure the most dynamic, industry-leading speaker that brings unique expertise and communication skills. That speaker is Mark Holton. You and your delegates will be glad you did.



“Thank you for your Financial Management presentation at the PGA National School. Our evaluation of the Training School confirms a high level of satisfaction amongst the trainees and your contribution is invaluable in terms of the trainees’ professional and academic development. The ability to draw upon your industry knowledge enables the intensive school programs to maintain the high standards that are synonymous with the Australian PGA. We certainly appreciate your willingness to involve yourself in developing the next generation of PGA members.”

Geoff Stewart
Manager
PGA of Australia

TESTIMONIALS

“Mark is a consummate presenter. He is an expert in Business Advisory services and how to efficiently implement them. Clients have only positive feedback about Mark’s presentations. His professional background as an accountant enables him to present business advisory systems and tools from the accountant’s perspective. He has high integrity and never fails to impress. His volunteer work for Ronald McDonald House is a real inspiration.”

Angus Ogilvie
New Zealand Sales Manager
MYOB

“On behalf of the delegates at the Nexia Australian & New Zealand Conference, may I extend a vote of sincere thanks for your fantastic address. I received a number of complimentary remarks about your speech which opened a few eyes to the idea of adding value rather than just compliance to the suite of services offered by each of the accounting firms present.”

Martins Matthews
Partner, Forsythes Accountants

ACADEMIC QUALIFICATIONS

Master of Commerce

University of New England

Graduate Certificate in Professional Accounting

University of New England

Graduate Certificate in Management

University of New England

Bachelor of Adult Education

University of Technology

Advanced Diploma in Business Management

Australian Vocational College

Advance Diploma in Financial Planning

Integrity Education

Diploma in Financial Planning

Integrity Education

Diploma in Financial Services (SMSF)

Integrity Education

Diploma in Training & Assessment

Australian Vocational College

Diploma of Teaching (Technical) with Distinction

University of Technology

Diploma of Logistic Management

Australian Vocational College

Certification IV in Training & Assessment

Central Coast Community College

Certificate in Commerce

TAFE New South Wales

Australian Institute of Company Directors

Company Directors Course (Graduate)

PROFESSIONAL MEMBERSHIPS

Fellow
Fellow
Fellow
Fellow
Fellow
Fellow / Graduate
Registered Tax Agent
Chartered Tax Advisor

CPA Australia
Institute of Professional Accountants
Taxation Institute of Australia
National Tax and Accountants Association
Australian Institute of Management
Australia Institute of Company Directors
Tax Agents Board
Taxation Institute of Australia

EXPERIENCE IN PRACTICE

Managing Director and Tax Agent at Dynamic Taxation Services (DTTS) for over 30 years. The organisational structure is hierarchical based with the Managing Director driving performance and standards. As Managing Director my overall responsibility is for;

- Compliance Accounting for Individuals, Sole Traders, Partnerships, Companies, Trusts and Superannuation Funds
- Strategic Taxation Planning
- Financial Management Consulting
- Fringe Benefits and Salary Packaging
- GST advice and assistance
- Financial Statement Preparation
- Business Advisory consulting



For more than **20 years** I have had the pleasure of speaking to and training the leading lights of the accounting profession. **These are some of my many highlights.**

PRESENTATION AND TRAINING EXPERIENCE

- Presenting Profit from Compliance seminars for MYOB Australia and New Zealand for 8 years
- Presenting taxation legislation updates for the MYOB Tax Seminars in Australia for 10 years
- Presenting at the MYOB client seminars for 6 years in taxation law and practice, financial interpretation and analysis skills and payroll management
- Presenting at the MYOB United Kingdom From Compliance to Reliance seminars for 2 years
- Presenting the CCH Canada Business Advisory seminars for Accountants across Canada
- Keynote speaker at the CCH Canada Get Up and Grow seminar series
- Keynote speaker at the CCH Canada Building a Better Practice seminar series
- Keynote speaker at the CCH Canada Profit Improvement in your Practice seminar series
- Keynote speaker at the Latvian Outsource Accountants Conference
- Keynote speaker at the 2020 United Kingdom Conference
- Keynote speaker at the 2020 United Kingdom Members Day Out
- Keynote speaker at the MYOB Certified Consultants Conference on financial management
- Speaker at the CPA NSW Division Members Conference at the Hunter Valley
- Running Implementing MYOB ProfitOptimiser in your practice training in Australia and New Zealand for 8 years
- Running Generating Revenue in your practice training for MYOB in Australia and New Zealand for 6 years
- Running Scenario Management training for MYOB in Australia and New Zealand for 6 years
- Running Implementing CCH Profit Driver in your practice training in Canada for 6 years
- Running Implementing MYOB Performance Optimiser in your practice training in the United Kingdom for 3 years
- Speaker at Chartered Accountants Public Practice Forums
- Speaker at Institute of Public Accountants Public Practice Forum
- Speaker at numerous Accounting Firm Partner Retreats & Conferences
- Speaker at CPA Public Practice Conferences
- Speaker at Kreston International Conference, Rio de Janeiro
- Speaker at Bentleys Australian Partner Conference, Shanghai, China
- Speaker at Wolters Kluwer UK Major Advisory Client Event, London UK
- Speaker at Accountex on Advisory Implementation & Systems, London UK
- Speaker at Institute of Public Accountants National Congress
- Speaker at Institute of Public Accountants State Congress

CONSULTING AND EVENT EXPERIENCE

“I have consulted to the Accounting industry for over 20 years in the field of business advisory services implementation and delivery. I have worked with numerous practices to train their staff and help manage their service delivery. I am recognised as the industry expert in Business Advisory Service Implementation.”

FELLOW DIRECTOR IN SMITHINK

I am a fellow Director in *Smithink* with David Smith CA. We provide consulting and practice management services to the industry. We also run a series for conferences and events for accountants including;

- Business Advisory Conference
- Young Guns Workshop
- Small Firms Best Practice Conference
- Practice Managers Conference
- Firm Opportunity Seminars

We also offer a range of planning and facilitation services to the industry including;

- Facilitating strategic planning retreats
- Performing reviews of firm management
- Advice on practice processes and technologies
- Coaching and mentoring of partners and staff
- Assessing partner performance and designing profit sharing schemes
- Acting as external chairman and/or strategic advisors to accounting firms
- Conducting seminars and workshops for clients
- Developing business advisory implementation plans
- Training on key business advisory tools and procedures



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