



COMPANY PROFILE





Our Journey

CooperAitken's roots go as far back as 1914 when T J Ryan set up an office in Morrinsville.

The CooperAitken you see today is the result of many mergers of accounting businesses over the years.

Our client base has grown substantially over the last few years, and we are very proud of that, in some instances, we are working with third generation clients.

Creating freedom in your business by providing peace of mind, saving you money, saving you time.

Our Values

Our core values that we strive towards are:

- Professionalism
- Delivery of high quality service
- Friendly and approachable
- Vibrant and energetic
- Progressive and forward thinking
- Community spirited

We want the very best for our clients, for them to be successful and grow.



// As a result of the mergers, we have been able to increase our services and draw on more knowledge within the business to add even more value to our clients. We will always seek opportunities to enhance our clients business activities. **//**

TREVOR COOPER

// Our history is important to us; it is a privilege to work with several generations within a family as it provides a solid foundation, so we truly understand the family's needs. **//**

RODNEY AITKEN

CooperAitken - Key Facts

Office Locations

CooperAitken has three offices:

MORRINSVILLE 42 Moorhouse Street,
PO Box 23, Morrinsville. Ph: 07 889 7153

MATAMATA 2a Arawa Street, PO Box 51,
Matamata. Ph: 07 888 8002

THAMES 309b Pollen Street, PO Box 559,
Thames. Ph: 07 868 9945

The team at CooperAitken

- 9 Directors
- Over 20 Chartered Accountants
- Total team in excess of 100 members

There is always someone to help you at CooperAitken. Each director has an excellent and capable team around them. These people are actively involved with your work, so if your director is away there is always a knowledgeable team member available to help you.

Specialised Teams at CooperAitken

We have team members that are experts in a number of areas, ensuring we are up to date and capable of providing the best advice:

- Payroll Services
- HR Assistance
- Accounting Software
- Tax
- ACC Review
- DairyBase Benchmarking
- Review Team
- Company Administration
- Marketing and Business Coaching
- Trust Administration and Trustee Services

Chartered Accountants

CooperAitken has a high ratio of qualified Chartered Accountants. To become Chartered, individuals have undertaken a rigorous program of study, passed numerous examinations and had extensive practical work experience. In addition they undertake compulsory ongoing professional development to ensure their knowledge is up to date and their skills are maintained.



Professional Alliance

CooperAitken and our team are members of the Chartered Accountants Australia and New Zealand (formerly NZICA). Belonging to this Institute means we are bound by strong and enforceable rules relating to our ethical and professional conduct.

They undertake regular reviews to ensure we are meeting these standards

Community Sponsorship

CooperAitken plays a very active role in our local communities. This includes many clubs, organisations and events in our local areas.



Our Directors

Grant Eddy, MMS CA

In 2017 Grant celebrated his 25th year with the firm, including 20 years as Director, and over 10 years managing the firm. Grant holds a Masters degree in Business Management and Systems.

He has varied professional interests and can support you and your business with Trust Management, Business Governance & Structure, IT solutions and Team Development. He is active in community organisations and a member of the Waikato Chartered Accountants Leadership team.

Having an open door policy, Grant likes to help others obtain the best solutions for clients,

team members and the firm.

After a two year break from managing the firm Grant is enjoying the CEO role again and re-focusing the firm on customer service, team development and efficient use of new systems.



Mobile: 029 276 6637

Email: grant@cooperaaitken.co.nz

Gavin Haddon, CA

Gavin became a Partner of Cave, Bannin, Sexton, Cooper in 1997, after working for the partnership for 10 years. He is primarily based in our Thames office.

If you are looking for someone who is focused on success, growth and profit, then Gavin is the perfect fit for you. Gavin will focus on finding the right solutions to help you and your business reach financial aspirations and lifetime goals. He has a strong interest in succession planning and trusts.

Gavin always involves himself in local communities, volunteering his skills to charity trusts and other organisations.

Mobile: 027 221 0130

Email: gavin@cooperaaitken.co.nz



Imran Raza, CA

Imran has been involved in the accountancy profession since 1985, initially with large international practices.

He became a Partner in R M Aitken & Associates in 1997.

He has a special interest in areas such as financial modelling, valuations and business planning, and can provide you and your business with assistance in all these areas. Imran likes to look for new and better ways of doing things.

If you are looking for support on innovations and entrepreneurial ventures Imran can help you succeed. His talents extend to developing a software package for use at CooperAitken, which was later sold to a multinational company. Imran is also a Director of AgriSmart, dairy compliance software and winner of the Fonterra Activate 2.0 competition.

Mobile: 021 243 2977

Email: imran@cooperaaitken.co.nz



Our Directors

Peter Hexter, BBS CA

Peter joined the firm in 1998 and became a director in 2004. Peter's passion is helping his clients to achieve their financial goals and aspirations.

As part of this process Peter will help you learn. He will guide you through understanding your financials and how to make business decisions that will benefit your business and the family. Minimising tax is always a strategy, but building assets and cash flow is essential. Peter works diligently with you during all stages of your business career, from start up to succession planning. He enjoys working with a wide range of clients from the commercial sector to the rural scene.

Seeing success for his clients is the motivation that drives him each day.

Clients, team and family are all important to Peter. Technology and processes (systems) are key elements in business today and Peter will work with you to ensure you are making the most of these.

Mobile: 0274 669 035

Email: peter@cooperaйтken.co.nz



Anna Bennett, CA

Anna joined CooperAitken in 1999, becoming a Director in 2010. She is based in our Matamata office.

If you are looking for a local accountant who wants to build a long-term relationship with you and your business, Anna is the perfect fit. She can help you reach your financial aspirations and future lifestyle goals.

Anna will support you, ensuring company structures, succession plans and tax strategies are correctly in place to maximise all opportunities.

She is an active member of the Matamata community and is always looking at ways to promote the town.

Mobile: 021 030 0508

Email: anna@cooperaйтken.co.nz



Coral Phillips, CA

Coral became an Associate at CooperAitken in 2009, and went on to become a Director in 2018. She has a genuine desire to help others and build an excellent rapport with clients, having been with CooperAitken since 1998. Coral will help you understand the financial aspects of your business better.

Initially a dairy farmer for many years before becoming a Chartered Accountant, Coral has great insight into the dairy industry and a strong focus on supporting rural clients. Her skills include business planning and helping

you understand what is involved in running a successful business. Coral will help you succeed in your business.

She is also passionate about assisting with training our team.

Mobile: 027 285 1106

Email: coral@cooperaйтken.co.nz



Our Directors

Carissa Cressy, CA, BMS

Carissa started her career at CooperAitken in 2008, became an Associate in 2014 and stepped into her role as Director in 2018. She has a strong rural background and gained much of her accounting experience working alongside the directors in Morrinsville. Since 2011 she has been working closely with Anna Bennett, helping her grow the business in Matamata.

Carissa's accounting experience, and friendly and vibrant personality, has enabled

her to develop genuine, long-term business relationships with clients, and she can help support your business.



Mobile: 021 448 240

Email: carissa@cooperaaitken.co.nz

Amy Coombes, BBus, CA

In 2015 Amy re-joined the team as a Client Manager and went on to become a Director in 2018.

Amy is a Chartered Accountant with over 10 years accountancy experience in a variety of roles. As a dairy farm owner Amy has an interest in the Agri-business sector and appreciates the challenges and complexity of running a dairy farming operation which allows Amy to relate to her clients and build lasting relationships.

As a member of the Institute of Directors, Amy has an interest in governance and has recently

been selected to participate in the Fonterra Governance Development programme.

Amy sees this as a great fit for adding value for her clients where more emphasis is being placed on how businesses are governed.

Mobile: 027 715 2728

Email: amyc@cooperaaitken.co.nz



Rory Noorland, LLB, BMS, CA

Rory joined CooperAitken in 2016 and became a Director in 2018. Previous to this, he spent 10 years with a Big Four accounting firm in Hamilton, in both the Business Advisory and Tax teams. Rory studied at the University of Waikato gaining degrees in Law and Business Management Studies, and has been a Chartered Accountant since 2011. He can assist you in many ways and has an on-going interest in the area of taxation and in particular the rules in relation to land transactions, SME business and rural/agri tax issues.

Rory has served on the committee of Melville United for the previous 11 years, 6 of those in the role of treasurer.



Mobile: 021 721 368

Email: rory@cooperaaitken.co.nz

Our Senior Team

Trevor Cooper, BMS, CA, JP Consultant

Coming from a strong commercial background Trevor joined Cave, Bannin and Sexton in 1984 and became a Partner in 1987. He has a keen interest in agricultural services and ensures that we continually keep up to date with the ongoing changes that affect our farming clients. Trevor became a Justice of the Peace in 1987 and this is just one of the many ways he gives back to the local community.

Mobile: 027 588 8141

Email: trevor@cooperaitken.co.nz



Rodney Aitken, B.Com FCA Consultant

Rodney joined his father's Morrinsville practice in 1978 and became a Partner in 1979.

In 1996 Rodney was made a Fellow of the Institute of Accountants of New Zealand for his services to the accounting profession over a 20 year period.

Locally born, Rodney has been involved in various community activities.

Mobile: 0274 889 020

Email: rodney@cooperaitken.co.nz



Deborah Hollands, CA, BCom - Associate

Deborah has been working for CooperAitken since 2001, becoming an Associate in 2008. Deborah has worked closely with our directors for many years, enabling her to gain a broad knowledge base over a variety of industries, and now applies this experience to her clients. She can help you with quality control, and has instigated many new procedures and

developed systems to ensure the highest standards are maintained for our clients.

Mobile: 027 253 9955

Email: deborah@cooperaitken.co.nz



**MORRINSVILLE**

42 Moorhouse Street, PO Box 23, Morrinsville 3340

[p] 07 889 7153 [f] 07 889 7151

MATAMATA

2a Arawa Street, PO Box 51, Matamata 3440

[p] 07 888 8002 [f] 07 888 8556

THAMES

309b Pollen Street, PO Box 559, Thames 3540

[p] 07 868 9945 [f] 07 868 9942

[e] mail@cooperaitken.co.nz | www.cooperaitken.co.nz

