



COMPANY PROFILE



CooperAitken's  
professionalism  
demonstrated by being  
crowned

**Bayleys Supreme  
Business Award  
Winner**

and the

**Professional Service  
Award Winner**

at the Matamata Piako  
District Council Business  
Awards 2019.

CooperAitken, a chartered accounting firm who has served rural communities in the Waikato for more than 100 years, from Morrinsville to Matamata to Thames-Coromandel. Offering an unparalleled solution, through a portfolio of advisory services, enabling clients to enhance their overall business activities and endeavours.

Our aim is to support clients throughout their life's journey, lifestyle and aspirations - Giving you, your family and your business peace of mind, saving you money and saving you time.

## See what sets us apart...

CooperAitken is a diverse group of dynamic individuals, a unique mix of gender, age, industry experience and specialist skills, this together with a progressive go forward attitude puts us **ahead of the rest.**

**Our diversity is a key ingredient to  
helping our clients.**

## Portfolio of Services

Many accountants offer a variety of services, however at CooperAitken we employ specialists in each of our dedicated divisions to help ensure clients receive professional support, high quality advice and the help they need to succeed in business.

**CooperAitken's professionalism demonstrated by being crowned the Bayleys Supreme Business Award Winner and Professional Services Award Winner at the Matamata Piako District Council Awards 2019.**

# CooperAitken - Key Facts

## Office Locations

CooperAitken services clients throughout New Zealand, with three physical offices located in;

**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** 104 Sealey Street, PO Box 559,  
Thames. Ph: 07 868 9945

## The team at CooperAitken

- 8 Directors
- Over 30 members of Chartered Accountants (CAANZ)
- Total team in excess of 100 members

There is always someone to help you at CooperAitken. Each director has an excellent and professional team around them.

A diverse team with a wide range of skills and experience.

## Specialised Divisions at CooperAitken

With Chartered Accountancy as our core service, CooperAitken has dedicated experts in our divisions to ensure the best possible support and advice for our clients. Examples of these services are;

- ACC Review
- Company Governance & Administration
- DairyBase Benchmarking
- HR Assistance
- Marketing and Business Coaching
- Payroll Advisory
- Software Solutions & Training
- Tax Advice
- Professional Trustee Service & Administration
- Estate & Succession Planning
- Business Appraisal

## 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.

## Professional Alliance

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

## Community Sponsorship

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





# Senior Team

## Anna Bennett, CA, Director, Chairperson

Anna joined CooperAitken in 1999, becoming a Director based in Matamata in 2010, and was recently appointed as the Chairperson of the CooperAitken board. She joined CooperAitken in 1999, becoming a Director based in Matamata in 2010. Anna's family live in Matamata and enjoy being part of a rural community. 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. Anna 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. Anna joined CooperAitken in 1999, becoming a Director based in Matamata in 2010, and was recently appointed as the Chairperson of the CooperAitken board.



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## Grant Eddy, MMS, CA, Managing Director

Grant has celebrated over 25 years with the firm, including 20 years as a 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. Grant is enjoying the CEO role again and re-focusing the firm on customer service, team development and efficient use of new systems.

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## Gavin Haddon, CA, Director

Gavin is a Director based in our Thames office. You would describe Gavin as down to earth, genuine and friendly, absolutely full of energy and he will deliver 100% on the promises he makes. He will push the boundaries to get the very best results and solutions for his clients, helping them achieve their goals and aspirations. Gavin has a wealth of experience, becoming a partner of the firm in 1997. He is also a great mentor at CooperAitken. Many careers have advanced under his watchful eye. As the owner of a dairy farm, running a 50/50 sharemilker, Gavin understands the dairy industry and in particular, he has a strong interest in succession planning and trusts. If you are looking for someone who is focused on success, growth and profit, then Gavin is the perfect fit for you.

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# Senior Team

## **Peter Hexter, BBS, CA, Director**

Peter joined the firm in 1998 and became a Director based in our Morrinsville office in 2004. Peter's passion is helping his clients to achieve their financial goals. He will guide you through understanding your financials and how to make business decisions that will benefit your business and 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.

Peter enjoys working with a wide range of

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

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## **Coral Phillips, CA, Director**

Coral is a Chartered Accountant based in our Morrinsville office. She 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.

She is also passionate about assisting with training our team.

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## **Carissa Cressy, CA, BMS, Director**

Carissa is a Chartered Accountant. She started her career at CooperAitken in 2008, became an Associate in 2014 and a Director in 2018 based in Matamata. She has a strong rural background and gained much of her accounting experience working alongside her fellow directors in Morrinsville.

Since 2011 Carissa has been working closely with fellow Director, Anna Bennett, helping her grow the business in Matamata. Carissa is 100% committed to her clients and is extremely focused on helping them grow and succeed.

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.

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# Senior Team

## **Amy Coombes, BBus, CA, Director**

Amy is based in our Morrinsville office. She is a Chartered Accountant with over 10 years accountancy experience in a variety of roles. Amy first joined us back in 2007 as a Senior Accountant. In 2015 after some time away, Amy re-joined the CooperAitken team as a Client Manager and went on to become an Associate, then a Director in 2018.

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 a keen 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.

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## **Rory Noorland, LLB, BMS, CA, Director**

Rory is a Chartered Accountant and Specialist Tax Advisor based in Morrinsville. He joined CooperAitken in 2016 after 10 years with a Big Four accounting firm in Hamilton, in both the Business Advisory and Tax teams. Rory then became an Associate of the firm in 2017 and a Director in 2018. 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 13 years, 8 of those in the role of treasurer.

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## **Deborah Hollands, CA, BCom, General Manager**

Deborah has been working for CooperAitken since 2001, becoming an Associate in 2008, having worked closely with our CEO for many years Deborah is now our General Manager. Project managing a multitude of initiatives, instigating, developing and implementing a number of new procedures and systems to ensure the highest standards are delivered effectively for our clients.

Her clients benefit from both her broad accounting knowledge that extends to a

variety of industries, and her general business attributes meaning she can often see newer or better ways of doing things in your business.

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