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Leeanne Judith Summers

Office: 13 Cochrane Court Castlemaine 3450

Email: leeanne.j.summers@gmail.com

Postal address: 13 Cochrane Court Castlemaine 3450

Telephone 0438 334644

Profile

An accomplished, versatile, and results-driven Chartered Accountant with a proven track record who has strong leadership skills.

Act as mentor, trainer and business advisor to owner operated family businesses and not-for profit entities. Facilitated strategic planning sessions for numerous businesses.

I specialise in solving problems for my clients with bespoke solutions.

Assignments undertaken include:

- Support start- up owner-operated businesses.
- Mentor for Business Victoria, supporting owner operated businesses throughout Victoria with on line mentoring and travelling on the Small Business Bus.
- Preparation of financial statements, budgets and cash flow statements for all size and types of legal structures and businesses.
- Project manager for many clients which has included managing the accounting function for the Australian secretariat of the International Aids Society conference held in Melbourne in

July 2014. At the time, it was the largest conference held in Victoria with over 15,000 participants.

- Providing financial support to families who are transitioning family members into to aged care. Negotiated Refundable Accommodation Deposits (RAD) and Refundable Accommodation contributions (RAC). Liaised with My Aged Care and Centrelink.
- Acted as an Executor for Estates, together with providing administrative and technical support to clients who are acting in a executorial role.
- Finance officer for Not-for-Profit organisations.

Working collaboratively with other professionals is the hallmark of my style. I am a critical thinker who is prepared to make decisions to ensure that projects and assignments are completed in a timely fashion.

Key Competencies

- Strong leadership skills.
- Articulate communicator with strong written and verbal skills.
- Competent manager.
- Has a curious mind and is prepared to challenge processes.
- Prepared to think outside the square.
- Easily adaptable to change.

Career Summary

- Business mentor – Business Victoria (working with Monarch Institute), 2020 – present
- Financial counsellor - Rural Financial Counselling Service Victoria West 2023 - present
- Consultant, LJS Consultancy Services Pty Ltd October 2016 to 2024
- The Bennett Group 2012 – October 2016, Client Services Director
- The Bennett Group, Chartered Accountants 1990 – 2012 as a principal of business, prior to sale of practice

Education

- Member of Chartered Accountants Australia and New Zealand
- Business Degree from the University of Tasmania

Professional development

- Member – Family Business Australia
- Member – Society of Tax and Estate Practitioners (STEP)
- Founding Member – Family Business Institute
- Member – Taxation Institute of Australia for over 25 years*
- Registered Tax agent for over 25 years*

(* have recently relinquished membership)

Key IT Skills

- Accounting software packages – MYOB, Xero
- Microsoft Office – Excel and Word

Other Details

Am a committed supporter, office bearer and volunteer of Soroptimist international, a service organisation for women who undertakes to educate, empower, and enable women and girls around the world to reach their full potential.

Positions held:

- Finance convenor – Soroptimist International – Cambridge UK
- Treasurer and Finance convenor- Federation of the Soroptimist International South East Asia Pacific
- President – Soroptimist International Region of Victoria
- Director and Treasurer – Soroptimist Headquarters (Victoria) Inc.
- Numerous positions at the local club level

References are available on request.