



ACCOUNTANTS  
& AUDITORS

## Financial Leadership through Professional Excellence



Financial intelligence means one has the knowledge and understanding of the finances of an enterprise, together with the rules of the external operating environment. Financial leadership is the interpretation of this knowledge to achieve maximum benefit for the organisation and its people.

At MD, we open doors to Financial Intelligence to help you leverage the core competencies of your business so as to maximise your ultimate goal of wealth production for stakeholders.





## OUR VISION

MD Accountants & Auditors Inc. is a multi-disciplinary firm of Chartered Accountants offering a variety of related professional and advisory services to private and corporate clients. Financial Leadership through Professional Excellence is our strategic intent and our vision.

Every aspect of our business is geared towards customer service, offering financial knowledge, working for optimum results and helping you maximise your business and financial goals.

Relationships with our clients are of the utmost importance to us. We enjoy working with you and building relationships, by offering excellent service, implicit trust and expert advice.

We achieve results based on mutual understanding,

respect and agreement. We offer peace of mind to clients because they know that their financial affairs are in good hands.

We think win-win and in so doing always give fair value to clients.

We believe in our people, staff and team and place a lot of focus on transformation, training and development.

We are a people's business so we structure ourselves to ensure each account is personally overseen by a Partner. The team assigned to each account has the professional qualifications and resources to provide top quality service.

Our clients see us as an integral part of their business, effectively an outsourced finance department.



## OUR SERVICES

- **Auditing and Review**
- **Technical Accounting**
- **Monthly Accounting**
- **Business Consulting**
- **Tax Planning and Administration**
- **Estate Planning**
- **Company Secretarial**
- **Personal Finance Planning**
- **Forensic Consulting**
- **B-BBEE Consulting Services**
- **Business Rescue Services**
- **Drafting of IFRS and IFRS for SME's compliant AFS**

We are proud to be able to offer reliable and trusted financial services through our bespoke network of associations and esteemed colleagues to satisfy your needs, for you as the business owner and for your employees.

### ***Our offering includes:***

- **Personal and Commercial Financial Investment Planning**
- **Human Resources Administration**
- **Risk Management**
- **Employee Benefits**
- **Property Transactions**
- **Business Brokering and Consulting**





## OUR PARTNERS



### Alexis Sacks

Alexis matriculated from Camps Bay High School and obtained her B. Comm PGDA from the University of Cape Town in 1991. She completed her articles with the Cape Town firm BDO

Spencer Steward where she qualified as a Chartered Accountant (SA).

She managed the audits of several companies and was also responsible for the efficient management of a partner's full client portfolio, thus developing strong technical abilities and expertise in the auditing and business consulting fields.

She joined MD in 1996, and became a Director in March 1997.

She specialises in auditing, tax planning and business consulting services. Alexis prides herself on her availability to clients at all times as well as the trust relationships she has formed with her clients, several of whom have been with her since 1996.

Alexis is also responsible for the training and development of all MD's CA (SA) and SAIPA learners. She has been instrumental in ensuring that the highest technical standards and training processes have been adopted by MD to assist the learners and to deliver a quality service to the clients.

Alexis completed the Broad-Based Black Economic Empowerment Management Development Programme with Distinction. She was one of the first practitioners in the Western Cape to be accredited with the Independent Regulatory Board for Auditors to provide verification services and issue compliant B-BBEE scorecards.

Alexis has recently been appointed as a Business Rescue Practitioner in the Western Cape to assist financially distressed businesses with the management of their affairs.

Alexis is a keen runner and cyclist and has encouraged and motivated numerous staff members to participate in various events leading to a more balanced and healthy lifestyle. She has also already participated in several Comrades Marathons.



### Dave Rich

After matriculating from Rondebosch Boys High School in 1981, Dave read for a B. Comm at the University of Cape Town where he graduated with distinction in financial management in 1985. He continued his studies

towards his CTA, during which time he was employed by the University as a part-time lecturer.

He articled with the Cape Town firm BDO Spencer Steward and passed his qualifying exams on first attempt in 1987. On completion of his articles, he was admitted as a Chartered Accountant (SA) in 1989. Dave then gained further experience through a secondment to the London firm of BDO Binder Hamlyn. On his return to South Africa, he worked for the Cape Town office of the South African Revenue Service.

Subsequently, he was the Financial Manager for Spar Western Cape, during which period he began consulting to various retailers.

In 1997 he decided to concentrate on the provision of consulting services to small and medium entrepreneurs and thus accepted a Directorship with MD.

This experience had ideally equipped Dave within his core focus of consulting in tax issues, business advisory and general consulting services.

He has also served on Audit Committees of Medical Aid societies, provided expert witness testimony in commercial cases and written various articles on his specialised focus of profit maximisation in the voluntary trade/ franchise sector.

Dave identified the strategic importance of a commitment to Broad Based Black Economic Empowerment early on in the partnership and has written two articles, published in several magazines on SME's and B-BBEE.

Dave was appointed as one of the first Business Rescue Practitioner's in the Western Cape to assist financially distressed businesses with the management of their affairs. We are proud of our record of success in returning distressed businesses to operational profitability saving jobs, protecting creditors and entrepreneurs investment.





## OUR ASSOCIATES



- **Senior Manager** Danie Haumann
- **Accounting Manager** Fatima Bapukee
- **Taxation Manager** Juanita Roman

Our team of professionally qualified and experienced individuals is key to the success of our business. We recruit top calibre people who are able to contribute to your total professional service. Our staff members are encouraged and trained to network with their peers, develop professional contacts and stay abreast of current issues and practices in the industry to deliver professional excellence.



## MD RETAIL MANAGEMENT CONSULTANTS

Our sister company RMC services the Retail and Hospitality Industries at large, with specific focus on the Voluntary Trading and Franchise areas. Their team provides a comprehensive Management Consulting service, specialising in operational systems and financial controls, to ensure that their clients are always in the position to make critical management decisions timeously, based on accurately provided information.

In addition, the company focuses on the set-up of new ventures through the critical first year of trade.

Its success is dramatically illustrated by the fact that the Voluntary Trading Group responsible for probably the highest turnover in this sector has retained RMC's services for all new stores in their first six months of trading, and has granted the company exclusive supplier status nationally.

Besides its professional accounting staff, the company enjoys the services of highly experienced operational and financial consultants.



## SUPPORTING OUR COMMUNITY

We believe in sharing our success and appreciation with the community and our clients. Our vision goes hand in hand with our Corporate Social Responsibility offerings. We regularly make donations each year to charitable organisations on behalf of our clients, as we continue to work with and support those in need. We are also involved in ongoing Corporate Social Investments, where we support our clients who are part of charitable organisations.



## CONTACT US



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