

MARK LOWIS

AJ&CO

ENTERPRISING . SAGACIOUS . PRACTICAL

Mark is a private enterprise and high net worth structuring specialist leading the Private Advisory & Revenue team.

INTRODUCTION

Mark's work often involves the development and implementation of tax-effective structuring solutions, particularly in commercial, family and wealth protection contexts.

A qualified Chartered Accountant and Chartered Tax Adviser, Mark offers clients a wealth of practical commercial experience gained from his time spent working in the accounting industry. He is also an advisory board member for several middle market private businesses around the country and regularly writes and presents for the Queensland Law Society, the Taxation Institute of Australia and other industry specific education providers.

Mark is the founder of Univise®, a private advisory management business which supports accounting firms to deepen their client relationships and grow their advisory revenue.

QUALIFICATIONS

Practising law since 2011
Bachelor of Laws/Bachelor of Commerce - James Cook University, Qld
Chartered Accountant (CA)
Chartered Tax Advisor (CTA)

EXPERTISE

Structuring and restructuring advice | Business succession planning, estate planning and wealth protection advice | Mergers and acquisitions | Commercial and private transactions | Income tax, GST, stamp duty, land tax and payroll tax advice | Trusts & asset protection | Professional adviser support services | Family office and advisory board services

CAREER HIGHLIGHTS

Facilitator: Tax Institute of Australia's Noosa Tax Intensive
A highly regarded national tax industry event focusing on current technical issues and tax policy affecting small and medium business owners and their advisers.

MEMBERSHIPS

Institute of Chartered Accountants (CA)
Taxation Institute of Australia (CTA)
Queensland Law Society (MQLS)

"Private business owners need solutions. They require an adviser who has the expertise and experience to simplify the issues at hand and support them in the decisions that matter most - whether the problem rests in a business context or their private life. This is the service ideal to which my practice subscribes."



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EXPERIENCE

Structured and executed the acquisition of a \$60m multi-storey commercial building in Fortitude Valley, Queensland for domestic and foreign investors.

Provided stamp duty advice to Ratch Australia for the \$380m Mt Emerald Wind Farm Project in Queensland.

Structured a \$400m privately-held Queensland business to support the succession, wealth transfer and retirement objectives of the business owners.

Restructured a \$20m property development business operating in Queensland and New South Wales.

Restructured a \$25m private investment trust based in Sydney, New South Wales.

Structured the development and commercialisation of a state-of-the-art Gold Coast leisure park venture.

Structured the development, commercialisation and capitalisation of an innovative Victorian organic waste processing business.

Structured the establishment of a private emergency health facility in North Queensland.

Structured and executed the sale of a \$14m retail property leasing and management business to a NYSE listed corporation.

Executed the sale of a medical software business to an ASX listed corporation.

Brisbane | Sydney | Melbourne

July 2018

"I engaged Mark to look after the legalities of selling my business after being referred to AJ&Co by another client. Mark was very efficient at negotiating and resolving all aspects of the sale, ensuring the best possible outcome during each phase of the process. I would highly recommend his services to anyone who values outstanding service with a friendly, professional attitude."

Glen Beumer, Software Developer and Entrepreneur

