



A CLIENT SUCCESS STORY

BUILDING A HIGH-QUALITY BUSINESS WITH CLARITY & CONTROL

BRENDAN DUNN OF ALLIED AIR CONDITIONING & REFRIGERATION, COFFS HARBOUR, NSW

For Brendan Dunn, co-owner of Allied Air Conditioning and Refrigeration, Coffs Harbour, quality has always been non-negotiable. Operating across domestic and commercial air conditioning, refrigeration and commercial kitchen installations, the business services a broad regional footprint. Stretching from Coffs Harbour through to Tweed Heads, Lismore, Moree and as far south as Taree - depending on the job.

Rather than competing on price, Allied Air Conditioning and Refrigeration has deliberately positioned itself at the premium end of the market, working closely with select suppliers who share the same commitment to quality.

"We work consistently with select suppliers that echo this with quality product. That gives us great buying power and allows us to invest in quality brands."

THE CHALLENGE: COST PRESSURES AND WORKFORCE COMPLEXITY

Like many trade-based businesses, Allied Air Conditioning and Refrigeration has felt the pressure of rising operating costs. Wage increases, fuel and the broader cost-of-living environment have all placed added strain on margins.

"Wage increases, cost of living, fuel - it all adds up," he said. "You can't just throw extra labour time at the problem. That's not the answer."

Labour shortages also present an ongoing challenge, particularly when apprentices become fully qualified. Competing with industries such as mining has made retention increasingly difficult, adding complexity to workforce planning.

"Competing with the Mining industry is always going to be a challenge," he said. "Training and retaining people in-house is something we'll need to keep navigating."

THE TURNING POINT: REAL-TIME VISIBILITY AND FORWARD PLANNING

Access to clear, real-time financial insights has played a major role in helping Allied Air Conditioning and Refrigeration respond proactively to these pressures.

"We've worked with Matt for over eight years," he said. "He helps us keep an eye on stock levels, bad debtors - we're less reactive and more ahead of the curve when it comes to decision-making."

Working closely with Matt and the R+M team has helped bring greater predictability to planning and day-to-day decision-making. "Matt has really helped make revenue and workforce planning more predictable for us," he said.

STRATEGIC ADVICE BEYOND THE DAY-TO-DAY

The advisory support extended beyond operational decision-making into longer-term strategy, including tax planning, investment decisions and business structure. Strategic advice also guided the purchase of a commercial property, providing a clear pathway to long-term wealth accumulation.

"Financially, we were able to do it because Matt provided the pathway and guided us through it," he said. "That decision has set us up for long-term wealth accumulation and growth."

When it comes to tax minimisation, structure and foresight have been key. "Matt is so switched on when it comes to business structure and how it influences tax mitigation," he said. "His ideas and recommendations are magic - he thinks way ahead and just understands how things work."

OWNERSHIP TRANSITION: CREATING CLARITY DURING CHANGE

During the process of purchasing the business and transitioning ownership, trusted advice and clear communication were critical. "Matt is exceptional at creating clarity," he said. "He mapped the entire process and made sure communication just flowed."

Support around capital gains tax, financing and cashflow planning played a critical role in the outcome. "That support was integral," he said. "Matt and the team were always available, response times were quick, and we could make decisions or resolve issues without delays."

THE VALUE OF PARTNERSHIP AND CONFIDENCE MOVING FORWARD

For Brendan, ongoing strategic engagement has been central to building confidence in the business's future. "Regular meetings and guidance are critical," he said. "It helps maintain forecasting and visibility across the key numbers. You're using retrospective data to actually inform future planning."

With strong cashflow, clear targets and trusted advice, Allied Air Conditioning and Refrigeration continues to operate with confidence, clarity and control in a challenging and evolving environment.



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