



AJ&CO

**Mark
Lowis**

Partner
Private Advisory – Commercial,
Tax & Restructuring



Private business owners require solutions. They seek an adviser who has the expertise and experience to simplify the issues and support them in the decisions that matter most – whether the problem rests in a business context or their private life.

Mark is a leading adviser to private enterprise and high net worth families in Australia.

Introduction

His passion is assisting his clients to reach their maximum potential, protect their assets and secure their future. Since commencing his career in 2007, Mark has guided many of the wealthiest and most complicated family groups in Australia – delivering exceptional outcomes in difficult situations.

Mark is known for his pragmatic approach and his ability to solve complex issues without losing sight of the family's 'bigger picture'. He is a confident contributor to several family advisory boards around the country.

Mark is also an experienced Chartered Accountant, Chartered Tax Adviser and Tax Agent.

Expertise

- Business structuring and restructuring
- Taxation and revenue law
- 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 and asset protection
- Professional adviser support services
- Family office and advisory board services

Experience

Recent transactions of note include:

- Restructuring the landholdings of a large SE agricultural business (\$60M+);
- Providing business succession and restructuring advice to an ASX 100 family business;
- Structuring and executing the acquisition of a \$60m multi-storey commercial building in Fortitude Valley, Queensland for domestic and foreign investors;
- Structuring a \$400m privately-held Queensland business to support the succession, wealth transfer and retirement objectives of the business owners;
- Restructuring a \$20m property development business operating in Queensland and New South Wales;
- Restructuring a \$25m private investment trust based in Sydney;
- Structuring the development, commercialisation and capitalisation of an innovative Victorian organic waste processing business;
- Structuring the establishment of a private emergency health facility in North Queensland;
- Structuring and executing the sale of a \$14m retail property leasing and management business to a NYSE listed corporation; and
- Executing the sale of a medical software business to an ASX listed corporation.

Qualifications

- Solicitor – Supreme Court of Queensland
- Solicitor – High Court of Australia
- Bachelor of Laws, James Cook University
- Bachelor of Commerce, James Cook University
- Chartered Accountant (CA)
- Chartered Tax Adviser (CTA)
- Registered Tax Agent
- GradDip Chartered Accounting – CAANZ
- GradDip Legal Practice – College of Law

Memberships

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



Mark Lewis
Partner

mlowis@ajandco.com.au
0432 093 664