

January - March 2026

## Global Experience, Local Knowledge

Welcome to the SME Funding Hub newsletter for Accountants & Lawyers.

In this newsletter we provide you with information on how we are assisting SME Business Owners to achieve growth through accessing tailored loans.

At SME Funding Hub we help small to medium businesses to source essential funds to help fuel business growth and debt structures that support your business goals for long-term growth and success.

To find out more about our SME Funding Hub contact Dev Sarker on 0404 167 989 or visit [www.smefundinghub.com](http://www.smefundinghub.com)



Great to be a volunteer  
marshall at LIV Golf again



## How SME Funding Hub Delivers Through Our Accountant Network

When an accounting firm referred a client with a complex property subdivision project, we knew it required more than just finance—it needed precision and collaboration.

The challenge? A corporate entity with multiple shareholders, each needing repayment in cash and development allotments during a refinance. Rather than navigating convoluted shareholder resolutions, we structured the transaction so all settlements occurred on the same day.

- \$3.1M refinance of an original \$4.5M loan
- Smooth execution without delays or disputes
- Client walked away with a tidy profit and several lots ready for construction

This is what happens when accountants and SME Funding Hub work together: strategic solutions that simplify complexity and deliver results.

Accountants: Want to add more value for your clients and strengthen your advisory role?

Partner with SME Funding Hub today.

**Let's make complex deals simple.**



We were delighted to sponsor the CFO Roundtable held on 30 January 2026 in the historic Old SA State Cabinet Room at the Adina Apartment Hotel Adelaide Treasury.

It was a fantastic opportunity to engage in meaningful conversations with finance leaders and fellow CA members. I especially enjoyed connecting with our MC, Scott Copeland, Programme Director – Accounting (UG) at Adelaide University, along with Matt Hobby and Megan Kivell from Perks People Solutions.

A big thank you to Scott Jones, Scott Mackenzie, Tania Whittington and Deanna Bryant from CAANZ for putting together such a well-organised and insightful event.

Looking forward to the next one!



Catch up on all of our articles and blogs at:  
<https://smefundinghub.com/blog/>

Recent articles include instant asset write offs, finance for professional services and much more.

Shield and First Guardian Master Funds As of 27 January 2026

AFCA Member Firm	No. of complaints		
	Shield	First Guardian	CSLR eligible?
<b>Advice Licensees</b>			
• Intergac Financial Planning Pty Ltd	308	582	N/A - firm solvent
• MML Financial Services Pty Ltd (In Administration)	156	1	Yes
• Financial Services Group Australia Pty Ltd (In Liquidation)	107	114	Yes
• Next Generation Advice Pty Ltd (In Liquidation)	16		Yes
• United Global Capital Pty Ltd (In Liquidation)	17	109	Yes
<b>Super Trustees</b>			
• Macquarie Investment Management Limited	89		N/A - firm solvent
• Equity Trustees Superannuation Limited	82	21	N/A - firm solvent
• Diversa Trustees Limited		178	N/A - firm solvent
• Neshwealth Superannuation Services Pty Ltd		82	N/A - firm solvent
<b>Responsible Entities</b>			
• Keystone Asset Management Limited (In Liquidation) (Receivers and Managers appointed)	35		No
• Falcon Capital Limited (In Liquidation)		122	No
<b>Grand total:</b>	<b>796</b>	<b>1,209</b>	

Slide 35

Great to spend the day at the 'Investment Committee' seminar on 4 February 2026 at Adelaide Oval, diving into the issues that matter most to investment advisers.

One of the standout sessions was delivered by Shail Singh, Lead Ombudsman at AFCA, who provided valuable insights into the lessons learnt from the Shield and Guardian debacle — a timely reminder of the importance of governance, transparency, and robust advice frameworks.

A well-run event and an excellent opportunity to connect, learn, and reflect on the evolving landscape of investment advice.

## We are here to help

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