



LEANNE THOMAS

PARTNER

PROFILE

Leanne was previously an Associate Partner at Ernst & Young in the EY Private tax division (2015–2023) and prior to this a Director at Edwards Marshall (2001–2015).

Leanne has broad experience in taxation advice and advises clients in a number of industries ranging from property, agriculture, professional services as well as not-for profits.

PROFESSIONAL QUALIFICATIONS & AWARDS

- Graduate Diploma of Chartered Accounting, The Institute of Chartered Accountants in Australia (2001)
- Bachelor of Accounting, University of South Australia (1997)

MEMBERSHIPS & REGISTRATIONS

- Member of Chartered Accountants Australia and New Zealand
- Fellow of the Taxation Institute

PROFESSIONAL EXPERIENCE

Leanne specialises in advising her clients on the most efficient tax and structuring of both business and personal assets, while considering her client's short term goals, any taxation implications and long term succession objectives in mind.

Leanne has a client base many of whom have been through a matrimonial, a family settlement or have received or are about to receive significant inheritance. Leanne works very closely with her clients through these legal processes and past them, to ensure her clients have a clear understanding of how taxation, cash flow, asset protection and legacy plans all affect the current decision making of her clients.

Leanne assists clients who are in the process of separation to determine the family asset pool and assist with allocations of assets in a tax effective manner.

Leanne advises clients with all manner of business structures and assists with compliance of financial and tax obligations, advises and assists not-for-profit entities and has previously provided outsourced CFO services for both profit and not for profit organisations.

Leanne joined Morris Forensic in May 2023 in order to develop skills in Forensic Accounting and further diversify her career experience while maintaining her tax practice.

Assessments of Economic Loss

Leanne has been engaged on a number of assignments in connection with the assessment of economic loss suffered by plaintiffs. Plaintiffs have included individuals and businesses.

Specific engagements have included:

- Assessment of economic losses arising from personal injuries.
- Quantification of losses arising from fraudulent conduct of employees.
- Quantification of lost profits on breach of contracts.
- Analysis of alleged losses arising from failure of registered advisers to provide appropriate taxation advice.

Business Valuations

Leanne has assisted with preparing business valuations for a range of businesses in a number of industries for the purposes of family law, separation of business interests, sale of businesses or restructuring transactions.

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BOARD & COMMITTEE POSITIONS

- Board Member, Dulwich Centre Foundation Inc (2013 – Current)
- Board Member, Terra Artemis Foundation (2020 – Current)
- Advisory Board Member for Private Family Group (2024 – current)
- Board Member, Childhood Cancer Association (2012–2014)
- Board Member and Chair of Audit & Risk Committee, Adelaide Film Festival (2006–2014)

PROFESSIONAL EXPERIENCE

Financial Investigations

Leanne has been engaged to assist with investigations involving the detailed review or reconstruction of accounting records and/or financial statements including tracing of funds to determine if there has been fraud or misappropriation of monies.

Specific engagements have included:

- Reconstruction of financial records of a deceased estate for a significant number of years to identify appropriate use of funds in relation to potential actions against the trustees.
- Investigation of alleged misappropriation of monies for specific property development.