

Dan Yu CPA

SENIOR CLIENT MANAGER

Accounting & Business Advisory



Dan Yu is a Senior Client Manager at BG Private, bringing over 20 years of experience in public practice accounting. Throughout her career, Dan has become a trusted advisor to small and medium-sized enterprises (SMEs) across diverse industries. Her focus is on providing meticulous, proactive support to ensure her clients' financial health and compliance.

With a strong eye for detail, Dan is always responsive and prioritises prompt communication, ensuring that client queries are addressed quickly and effectively. She is known for proactively reaching out to clients to ensure they are aware of any upcoming compliance deadlines and operational matters.

She is particularly adept at identifying opportunities for tax planning and optimising structures, helping clients stay ahead of their financial obligations.

Dan's client-centric approach is built on the foundation of strong relationships. Known for her calm, approachable demeanour, she works closely with clients to navigate complex accounting and tax issues.

Fluent in both English and Mandarin, Dan brings a unique global perspective to her work. Before settling in Australia, she lived in China, gaining valuable cross-cultural insights that enrich her advisory services.

Outside of work, Dan practices yoga, Pilates, and meditation, which helps her maintain balance and focus in both her professional and personal life.

BG Private is an association of separate firms that operate in Melbourne and Sydney under the same trading name. The Melbourne firm and the Sydney firm are not partners or agents of each other, and shall not be liable for any act or omission of each other. Liability limited by a scheme approved under Professional Standards Legislation.



For Today, Tomorrow & Beyond.

Qualifications

- Bachelor of Accounting

Memberships

- Member of CPA Australia
- Member of Institute of Public Accountants (IPA)

Highly regarded in

- Capital Gains Tax & Small Business Entity concession
- Compliance accounting
- Accounting software (XERO, MYOB, QuickBooks)
- Taxation advice

Specialisations

- Professional services
- SMEs
- Building and construction
- Property development
- Retail
- Hospitality
- Healthcare
- E-Commerce

+61 3 9810 0700

info@bgprivate.com.au

801 Glenferrie Road, Hawthorn VIC 3122

Locked Bag 50 Hawthorn VIC 3122

bgprivate.com.au