

# HLB JIM ROBERTS SERVICES AND CAPABILITIES

TOGETHER WE MAKE IT HAPPEN

## TAX PROFILE





**JIM ROBERTS**

## **Vision**

To provide innovative, client-focused financial and advisory solutions that drive sustainable growth and development for our clients and communities.

## **Mission**

To foster sustainable growth and development for our clients by leveraging our global network, local expertise, and innovative solutions.

## **Our Values**

We strive to uphold the highest standards of integrity, professionalism, and ethical conduct while nurturing a culture of collaboration, innovation, continuous improvement, and social responsibility in all our endeavours

## ABOUT US

HLB Jim Roberts is an auditing and consulting firm. It is a partnership of four Certified Public Accountants. It is one of the leading firms providing Audit, Tax and Advisory services within Uganda and across Africa.

HLB Jim Roberts provides Audit & Assurance services while Jim Roberts Consulting Ltd provides tax & advisory services.

HLB Jim Roberts is a member firm of HLB International, a dynamic network of independent professional accounting firms and business advisers.

HLB International is a leading global network comprising locally well-established member firms which mostly rank among the top 12 in each Country. Inspired for more than 40 years, HLB International is present in 157 countries, with 29,363 staff in over 1030 offices worldwide.

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<b>Founded</b>	<b>Partners</b>	<b>Partners' Combined Experience (Years)</b>	<b>Staff</b>	<b>Clientelle</b>	<b>Acquisition</b> Mungereza & Karisa	<b>Awards</b>
<b>2000</b>	<b>4</b>	<b>100</b>	<b>19</b>	<b>100</b>	<b>2018</b>	<b>Accounting Firm of the Year 2018</b>

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**Our Pre-qualification Status**

**Sector coverage**  
Our customers are from various sectors;  
Privately-owned, and publicly-owned companies and multinational corporations  
State-owned and government agencies Non-Governmental organisations

**Our services**  
Audit & Assurance  
Tax Advisory  
Internal Audit services  
Risk Consulting Services  
Capacity Building & Training  
Leadership Development and Coaching  
Executive Selection  
Anti Money Laundering (AML) Audits  
Management Information Systems (MIS) Audits  
Due Diligence  
Share Valuations  
Investigative Audits  
Financial Systems Strengthening  
Project Management  
Strategy and Policy Development  
Board evaluation and reviews  
Fund management

**Membership to Professional Bodies and Associations**

**Other Affiliated Bodies and Associations**

## Our Leadership Team

**CPA Dr. James Okello Onyoin**  
Managing Partner, HLB Jim Roberts  
CEO, Jim Roberts Consulting Ltd  
PCC, CPA, FCCA, DITA, MBA, BCOM

**CPA Robert Otala**  
Senior Partner  
CPA, FCCA, CIA, MBA, BCOM

**CPA Samuel Okurapa**  
Partner, HLB Jim Roberts  
CPA, FCCA, CIA

**CPA Julius Kenneth Okurut**  
Partner, HLB Jim Roberts  
Executive Director, Jim Roberts Consulting  
CPA, B.STAT

**Ruth Waibale Mwoga**  
Director. Audit, Finance  
and Administration  
CPA, ACCA, BBA

**Simon Odur**  
Manager, Tax Advisory Services  
DFM, PODITRA, B.COM

HLB Jim Roberts is a member firm of HLB International, a fast growing dynamic network of independent professional accounting firms and business advisors. Formed in 1969, HLBI is a leading mid-tier international accounting network, serving clients through its member firms in over 158 countries.



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## TAX CAPABILITY

More than ever, you need to have assurance that you are paying the right amount of Tax while ensuring your stakeholders have a positive perception of your business.

Our commitment and promise as Jim Roberts is to keep the client at the very centre of our service. Being a member firm of HLB International, it gives us the opportunity to draw specific Tax expertise from an even larger professional network in over 140 countries.

Our Tax team is comprised of professionals in the accounting field and Tax specialists who have rendered advice to a wide range of clientele in various industries i.e Manufacturing Industries, Banking & Finance, Mining & Energy, Oil & Gas Sector, Infrastructure Projects and Trading Sector.

We offer a range of services to support you. Each of our clients is unique, and we work with you to select only the services that you require, avoiding unnecessary cost on functions you can undertake in house or do not need. Our tax services are designed to reflect the expectation of the Uganda Revenue Authority (URA) and the needs of our clients, from large multinationals to privately held businesses owned by individuals.

### Trusted Knowledge and Expertise.

We ensure clients' compliance with laws and regulations including policies and procedures, and financial analysis of the financial statements. We have a strong team of trained and experienced external and internal auditors, public accountants, value analysts, and experts in cyber security.

### Our Clientele.

- Government
- Not for Profit
- Donor agencies
- Financial Institutions & Insurance
- Wholesale and Retail
- Hotel and Hospitality
- Transport and Logistics
- Information Technology
- Healthcare and medical
- Agriculture and plantations



**OUR SERVICES INCLUDE BUT NOT LIMITED TO;**

Tax Registration and de Registration

- Individual and Corporate Tax returns
- VAT and PAYE compliance
- Withholding Tax compliance.
- Tax Audit Assistance
- Transfer pricing
- Tax Opinion
- Expatriate Tax Solutions
- International Tax Planning and Structuring
- Tax Refunds
- Exemptions
- Representation of Client before Tax Appeals Tribunal where necessary
- Tax planning and advisory for contemplated transactions

**OUR INTERNAL AUDIT CLIENTELE**

Non Governmental Organisations	Private Sector	
NRECA	Vehicle & Equipment Leasing Limited	African Skies
Engeye HealthCenter	Jaab Oils Limited	Polypack Limited
	Rural Finance Initiative	HASCAL
<b>Forex Bureaus</b>	Agl Investments Limited	Mebo Documentaries
Access Forex Bureau	Home Builders Limited	JC Decaux
Tzars Forex Bureaus	YellowPages	Swan Air Travels
BebratesForex Bureau	Amnesia ltd	Alfill Millers Limited
	GalaxyFM	Kema Uganda Limited
	Elemental Energy Limited	Otada Holdings Limited

## MEET OUR TEAM

**CPA JAMES OKELLO ONYOIN**

**HLB Jim Roberts Plot 4, Jinja Road Kampala - Uganda**

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James is a Fellow of the Chartered Certified Accountants (FCCA), Certified Public Accountant (CPA), Professional Certified Coach (PCC), Project Management Practitioner, Public Financial Management & Governance Expert with more than 25 years' experience in International Development, covering over 10 countries in the Africa region.

He is a Board Member for Eskom Uganda Ltd and Chair Audit and Risk Committee. He is also Board Member Citibank Uganda Limited and Chair Board Audit Committee. James is Co-Founder and Managing Partner at HLB Jim Roberts, Certified Public Accountants and CEO at Jim Roberts Consulting Ltd. He is a Member of the Audit Committees of the Parliamentary Commission of the Parliament of Uganda and UAP Old Mutual Insurance Uganda Ltd. James is a member of the adjunct faculty of the Strathmore University Business School, Nairobi, Kenya.

James holds a B. Com degree from Makerere University and an MBA from Oxford Brookes University. He also holds a Post Graduate Diploma in Income Tax Administration (DITA) from the Uganda Management Institute and qualified as a PRINCE 2 project management professional.. James obtained a Doctorate in Corporate Governance and Leadership from the Commonwealth University and the London Graduate School.

James previously held senior leadership positions at Tropical Bank, URA, Ernst & Young (EY), KPMG, PwC, Ministry of Finance, Planning and Economic Development and the Ministry of Local Government. James has extensive hands-on experience in financial management consulting, training and capacity building, mentoring and executive coaching, change management, project management, tax administration and management, and implementation of Public Sector Reforms and Integrated Financial Management Information Systems (IFMIS). He also has deep insights in the fields of Audit & Assurance, Risk Management, and Governance and Accountability.

James has conducted various consultancy assignments for a number of bilateral and multilateral institutions, international development agencies (including IMF, World Bank, UNDP, SIDA, EU, USAID), and the Governments of Uganda, Kenya, The Gambia, Liberia, Tanzania (including Zanzibar), Ethiopia, Sudan, Lesotho, South Sudan and South Africa.

[www.linktr.ee/jonyoin](http://www.linktr.ee/jonyoin)

**CPA JULIUS KENNETH OKURUT**

**HLB Jim Roberts Plot 4, Jinja Road Kampala - Uganda**

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Julius is a Certified Public Accountant (CPA), Statistician and Economist. He has over 20 years' experience in Audit, Tax Advisory and Financial Systems Implementation for Corporations, Public Sector Entities and Civil Society Organizations.

He is a Partner at HLB Jim Roberts CPA and Executive Director, Jim Roberts Consulting Limited. In this role he is in charge of Tax and Business Advisory for a cross-section of Entities; Private, Public and Civil Society.

He previously served in Jim Roberts & Associates (Now HLB Jim Roberts) in different capacities; Audit Manager, Audit Supervisor, Audit Senior, IT manager, Financial Systems and Capacity Building Manager among others. Julius has extensive hands-on experience in Audit, Investigative/ Forensic Audits, Tax Advisory and Financial Management. He is a Board member for Credit Watch Services (CWS) Uganda formerly Credit Reference Bureau Uganda as well as a member of the Advisory Committee on Finance and Audit with St. Peters Asante Secondary School Mpigi. He has led teams in the fraud investigations in public, civil society and private sector assignments. Some of the assignments he has managed have been conducted through courts of law in Uganda.

**CPA OKURAPA SAMUEL, [FCCA(UK), CPA(U), CIA, CFSA, IIA(U)]**

**HLB Jim Roberts Plot 4, Jinja Road Kampala - Uganda**

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Samuel, is a Fellow of the Chartered Certified Accountants (FCCA), a Certified Public Accountant (CPA), and holds a specialty in internal auditing as a Certified Internal Auditor (CIA). He also obtained a specialty as a Certified Financial Services Auditor (CFSA) all awarded by the global institute of Internal Auditors headquartered in Florida USA. Samuel held key positions in banking, insurance, telecom, and public practice and served as an ED/CFO of a leading insurance company, the national insurance company in Rwanda (Sonarwa General Insurance) where he oversaw key processes; - due diligence, restructuring, and company capitalization together with regulatory administration processes. Prior to his financial role with the company, he provided decisive investigations as the Chief Internal Auditor of the company where he exposed fraudulent practices and control weaknesses.



Samuel has hands-on experience in internal audit roles and he served as the Chief Internal Auditor of Cairo International Bank, a role that spanned 5 years after his prior role as the Chief Internal Auditor for Nilecom/ Celcom, an MTN franchise in Uganda.

Samuel proudly served with HLB Jim Roberts, Certified Public Accountant from its inception as a Senior auditor before pursuing a career as an Internal Auditor. During this time, he implemented various audits on behalf of the firm from 2003 to 2005.

**CPA RUTH WAIBALE MWOGA**

**HLB Jim Roberts Plot 4, Jinja Road Kampala - Uganda**

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Ruth is Member of the Association of Chartered Certified Accountants (ACCA), affiliate Certified Public Accountant (CPA) and holds a Bachelor's Degree in Business Administration (BBA) from Makerere University. She is an accounting and financial management specialist with over 12 years' experience at the forefront of supervising external audits, project audits, internal audits, due diligence, value for money audits, accountancy, financial management and consultancy assignments for various international Aid and Non-Governmental Organisations, Private and Public Limited Companies, Financial Institutions, SACCOs, Governments & Public Sector Institutions.

She is currently the Manager Audit and Administration at Jim Roberts & Associates, Certified Public Accountants and a Board member for Women of Uganda Network (WOUGNET).

**CPA SIMON ODUR - PODITR, DFM, BBC(Hons.)**

**HLB Jim Roberts Plot 4, Jinja Road Kampala - Uganda**

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Simon is a highly qualified individual with an impressive educational background and extensive experience in the field of tax administration. He holds a Bachelor of Commerce (Hons) Degree from Makerere University, demonstrating his strong foundation in business and commerce. Additionally, he has pursued further education to enhance his expertise, completing a Post Graduate Diploma in Income Tax and Revenue Administration (PODITRA-URA) as well as a Post Graduate Diploma in Financial Management (DFM-UMI).

Simon's professional journey spans over a remarkable 27 years, during which he dedicated his career to the Uganda Revenue Authority (URA). From April 1993 to March 2019, he served in various roles within the organization, showcasing his loyalty and commitment. Simon's tenure at URA provided him with invaluable experience and a deep understanding of tax audits, tax dispute resolutions (including objections and appeals), and the application of tax laws.

Simon's vast knowledge and experience in tax administration make him a valuable member of Jim Roberts Consulting Ltd. With his background and expertise, he has a wealth of practical insights and skills to the company, enabling it to effectively handle tax-related matters for its clients. Whether it's conducting thorough tax audits, resolving complex tax disputes, or providing guidance on tax compliance, Simon's experience and proficiency ensure that Jim Roberts Consulting Ltd can deliver high-quality services in the field of taxation.





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