

Who We Are

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

Formed in 1969, HLB is a leading mid-tier international accounting network, servicing clients through its member firms in over 140 countries.

The network comprises member firms in over 140 countries who, collectively, have 1,900 partners plus 14,500 staff in 500 offices. Member firms provide clients with a comprehensive and personal service relating to auditing, taxation, accounting and business and financial management advice. In Africa member firms are in Countries like Uganda, Kenya, Tanzania, Angola, South Sudan, Cameroon, Burkina Faso, DRC, Egypt, South Africa among others. In western countries HLB International Member firms are in Countries like Canada, Netherlands, Japan, Norway, Sweden, United Kingdom, USA, Belgium, France, Mexico, Portugal, Poland among Other Countries

HLB focuses on quality and personal service. HLB's perspective is strengthened by an international corporate identity, projecting a consistent and distinctive image worldwide, necessary for attracting multi-national business.

Member firms are well established practices of high local standing, often ranking in the top 12 in their locality, such that high quality personal services can be provided in the principal business centres world-wide. This covers not only audit and tax compliance but a wide range of taxation and financial advisory services at both National and International levels.

HLB member firms such as Jim Roberts have extensive experience with all sizes of clients and types of assignments, ranging from large publicly listed and public sector clients through to owner-managed, director controlled companies.

Jim Roberts acquired Mungereza and Kariisa Certified Public Accountants in February 2018 and the Professionals from both firms came together to boost their service delivery.

Jim Roberts & Associates won the award of the **Institute of Certified Public Accountants of Uganda** as the **BEST ACCOUNTING FIRM FOR THE YEAR 2018**.

Jim Roberts & Associates

Is an auditing and a consulting firm with a partnership of four qualified chartered and certified public accountants and it is one of the leading firms providing Audit and Assurance, Public Financial Management Consultancy, Management Accountancy, Capacity building, Tax Advisory social and business research, Baseline studies, and Management Consulting services within Uganda and across Africa.

Our Mission

- To provide quality and timely professional services to the utmost satisfaction of our clients

Our Values

- Integrity
- Outstanding value to our customers
- Communicating openly and honestly
- Respecting one another



Our Philosophy

We are committed to promoting high standards of discipline, excellence and ethics through adherence to the firm's quality standards and value charter and the laws of the country and the profession.



Our Line Of Business



Our customers are of various sizes, including privately-owned, multinational corporations, state owned and government agencies as well as Non-Governmental organizations. Our industry expertise and efficient service provides many benefits to our customers and their businesses which include:

| Public Sector and Development Funding | Financial Services | Consumer and Industrial Markets |
|---------------------------------------|--------------------|---------------------------------|
| International Aid Organizations | Banking | Consumer Products |
| Government Bodies | Insurance | Building and Construction |
| Non-Governmental Organizations | Real Estate | Manufacturing and Production |
| Agriculture and Plantations | Forex Bureaus | Transport and Logistics |
| Regulators | Cooperatives | Communication |
| Health Services and schools | Micro Finance | Leisure and hospitality |

Our Service Line

“Individual consumer attention is a fundamental aspect of the professional services offered by Jim Roberts”

Audit & Assurance

We provide services in auditing, finance and advisory matters. Amongst these services are: Provision of financial audit including statutory audits, Program audits, Information technology audits, Performance audits, Operation audits, Due diligence reviews related to the acquisition, sale, mergers and valuation of companies and businesses, and Development or assistance to the internal audit function.

Tax Advisory

Our approach to tax planning encompasses the entire spectrum of direct, indirect and personal taxes. We provide quality business oriented national and international advice. Our experienced tax professionals are drawn from various backgrounds with industry specialization, service line expertise together with advanced training that equips them to work with our clients and be their professional tax advisors in a wide spectrum.

Financial Services

Our firm offers financial advisory services which include but are not limited to the following:

- Design and development of finance functions,
- Preparation and development of accounting manuals for different departments, entities, and organizations,

- Review of financial, internal and security controls in a computerized environment,
- Financial investigations and forensic audits
- Wealth management and advisory services

Baseline Surveys & Research

Research forms a basis for innovation and invention. JIM ROBERTS offers support in base line surveys and Research Services which include but are not limited to the following, in addition to our other portfolio of services:

- Social research
- Baseline surveys/Studies
- Operational and business research
- Needs assessment

Risk Consulting Services

As the business and regulatory environment continues to evolve, organizations face unprecedented regulatory scrutiny, emerging and systemic risks that can be a challenge to traditional strategies and assumptions. Our Risk consulting partners and professionals can help over turn risk and compliance efforts into opportunities to drive sustainable business value.

Public Financial Management

We offer a range of consulting in the Public Sector Financial Management Reforms Area in the following:

- Review of Public Sector Financial Management Systems
- Preparation of Financial Statements
- Government financial procedures
- Design and implementation of Financial Management Systems

Monitoring & Evaluation

We offer monitoring and evaluation services especially to determine whether intended project or organizational objectives for specific activities have been met. Our Monitoring and evaluation model is based on the application of evaluation standards to the basic log frame.

Capacity Building and Training

The challenge of all organizational managers is to recruit the best people, for the right jobs, train them, motivate them and retain them. Our firm recognizes the importance human resources play in attaining the desired results in any organizational situation.

Training and Capacity Building

Under this service line, we offer the following services:

- Training in ICT based skills i.e. Computer based packages, Microsoft Offices packages, Statistical packages, Accounting packages and selected financial management and audit areas.
- Training in budgeting, output based budgeting, devolved budgets, Accounting, economics, taxation etc.
- Training in business, economic, and finance courses for managers.

Project Management

We offer project management services with a proven track record in the successful implementation of international projects especially involving the implementation of enterprise-wide resource management systems. Our staff are affiliated to the worldwide leader in project management activities – the Project Management Union. We apply well tested project management tools, techniques and project planning tools like PRINCE, MS Project in the project management activities. We offer services as project managers to:

- Execute projects;
- Monitor and regularly review project progress in terms of accountability;
- Planning and re-planning consisting of periodic review, refining

Information & Communication Technology

At JIM ROBERTS, we offer ICT services that add value to clients. We partner with IT service and goods providers to deliver resilient solutions

We provide highly specialized ICT Services in the following areas:

- ICT Training and capacity building
- Free and Open Source Software (FOSS) and Technologies
- Design and development of systems
- Information technology, communications and information systems consulting
- Back office operations – running applications on behalf of clients
- Outsourcing components of systems Infrastructure design and maintenance

Membership to Professional Bodies

Jim Roberts and Associates has been prequalified and enlisted as a member of the following bodies:

- The Institute of Certified Public Accountants of Uganda (ICPAU)
- Institute of Corporate Governance of Uganda (ICGU)
- Rotary Club of Kampala – Day Break
- Kampala Club
- Lions Club of Kampala Central
- Institute of Internal Auditors Uganda (IIA)

Our Pre-qualification Status

- Office of the Auditor General
- European Union
- Bank of Uganda, **to audit commercial banks, Forex Bureaus and other financial institutions such as Microfinance institutions, Cooperatives**
- Public Procurement and Disposal of Public Assets Authority (PPDA).
- National Water & Sewage Corporation
- Oxfam
- Insurance Regulatory Authority to Audit Insurance companies.
- Uganda Communications Commission (UCC)

Key Personale & Management Staff

- Julius Tumuhimbise - Managing Partner - Certified Public Accountant, Masters in Business Administration, Bachelors of Science. 13 years of experience
- Robert Ojala - Partner - Fellow of Association of Chartered Certified Accountants, CPA(U), Master of Business Administration, Certified Internal Auditor, BCom. 20 years of experience.
- James Onyoin - Partner, Fellow of Association of Chartered Certified Accountants(FCCA), CPA (U), Masters of Business Administration, BCom, Diploma In Income Tax Admin, Prince 2 Practitioner. 20 years of experience.
- Christine Abotha Okalebo - Director Audit & Administration, FCCA, CPA(U), BCom, UDBS, Certificate, in Computerized Accounting (CA4SoHo). 15 years of experience
- Julius Kenneth Okurut - Tax & Business Advisory Manager, CCNA, CPA(U), B.Statistics, PG. Certificate E-commerce, Management Information Systems Specialist. 12 years of experience.
- Ruth Mwoga Waibale - Audit & Administration Manager, ACCA, CPA(U), Bachelor of Commerce. 12 years of experience.



Why Partner With Jim Roberts

We have a track record for coordinating similar assignments

Our staff/consultants have carried out training and capacity building, Audits, Accountancy, Financial Management consultancies in countries such as Uganda, Liberia, Rwanda, The Gambia, Sudan, Ethiopia, Lesotho, South Sudan, Kenya, Zanzibar (Tanzania), Botswana.

The Jim Roberts Methodologies and Team

For most people, the horizon is as far as they can see. At JIM ROBERTS, the horizon represents the threshold to an unseen world of new opportunities.

We are constantly searching for solutions that lie beyond the obvious. We combine insight, knowledge and original thinking to create new opportunities.

In the race for solutions that deliver results, JIM ROBERTS is the ultimate advantage partner for entities and organizations whose aim is to achieve high quality results consistently beyond targets, and beyond the horizon. We base our service approach and philosophy on the following pillars:

- Proven Performance delivery
- Reliability of Recommendations
- Unrivalled quality
- Excellent Service support

Industry Insight

For over 12 years, Jim Roberts has assisted an impressive list of Governments, successful public and private sector organisations

& NGO's in financial management. We approach every opportunity with a thorough understanding of your business goals and objectives, and then develop a customized plan to achieve fruitful results.

By committing to long-term partnerships, we ensure that your risk management aligns and supports your overall company strategy.

We are Vendor Independent

Whilst we work with large organizations, we remain independent and can understand the vendors philosophies products and services as well as their strength and weaknesses. Our aim is to work solely on your behalf to achieve the right outcome at the right price

We are Vendor Independent

Powerful ideas, innovative practice, lasting value. All our structures and procedures provide for quality performance:

- The methodology and design philosophy;
- How we operate;
- How we think of solutions to guarantee results.

Experience has taught us to take a clear sighted look at the latest market trends, to make the right decisions at the right time, and to treat our clients as valued partners in order to guarantee them quality.

Our Partners

Mr. Julius Tumuhimbise.

He holds a Bachelors of Science degree in physics and Mathematics, he is a Certified Public Accountant, holds a Masters in Business Administration and is also a member of the Institute of Certified Public Accountants of Uganda (ICPAU) with over 13 years' experience in the fields of Audit, Accountancy, Financial Management, Capacity building and training. Prior to working with Jim Roberts, Julius worked as a senior member of management in PKF Uganda and Centenary Bank Uganda.

Mr. Robert O'tala

Is a Fellow of Association of Chartered Certified Accountants, Certified Internal Auditor (CIA) and has a Masters in Business Administration. He is a Financial Management Expert with extensive experience in Quality assurance, Research, Audit, Accountancy, Capacity building and PFM reforms including; Implementation of Financial Management Systems across Africa in countries such as Uganda, The Gambia, Liberia and Rwanda

Mr. James Onyoin

Is a Fellow of the Chartered Certified Accountants (FCCA), Project Management Practitioner, Tax Professional and holds a Masters of Business Administration (MBA). He is a Public Financial Management (PFM) and Governance Expert with extensive hands-on experience in PFM and Tax reforms, project design, management, implementation, evaluation and quality assurance of Integrated Financial Management Information Systems in the African region (The Gambia, Kenya Liberia, Lesotho, Uganda, Ethiopia, Sudan, South Sudan, South Africa and Tanzania). James previously held senior management positions at the Tropical Bank, Uganda Revenue Authority, Ernest & Young, KPMG, and PWC. He is a board member at ESKOM Uganda, Citibank Uganda, CEO Summit Uganda. He chairs the Audit and Risk Committee at ESKOM and the Board Audit Committee at Citibank. James is a member of the adjunct faculty at the Strathmore Business School.

Our Staffing

The firm's team is comprised of 30 staff including three Partners/Executive Directors with masters degrees , professional accounting qualifications and over 20 years of extensive experience in research, baseline surveys, Audit , Accounting, Public Financial Management, Capacity building, Taxation, IT, Business Financial Management and Consulting.

Our Executive Consultancy Team

Mr. Flugence Mungereza

Is a Chartered Certified Accountant and has over 30 years of experience in Financial Management, Audit, Business Advisory, Management Consultancy, Financial Advisory, Quality Assurance, Privatisation and insolvency assignments.

Mr. Kariisa - Kasa Joram

Is a member of the institute of certified Public Accountant of Uganda, Fellow of Association of Chartered Certified Accountant, holds a masters in Human Resource Management, has over 30 years experience in Business Advisory, Audit, Management Consultancy.



Contact Us

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