



# tax and accounting

### our services

- **Tax and Accounting**
- Insurance
- Financial Planning
- Finance
- Portfolio Management
- Estate Planning
- Retirement Planning

### advice you can count on

Our Certified Practising Accountants (CPAs), Chartered Accountants (CAs) and Chartered Tax Advisers (CTAs) are at the top of their field. They are passionate about what they do and always seek to deliver the best results for their clients. Through continuous education and training, they maintain the latest specialist knowledge and are qualified to advise in the most demanding taxation and accounting matters.

### solutions that work for you

We can help you find opportunities and overcome challenges across a wide range of accounting and taxation areas, including:

- Income Tax
- Superannuation and retirement planning
- Fringe Benefits Tax
- Salary Packaging
- Business Activity Statements
- Capital Gains Tax
- Stamp Duty
- Land Tax
- Business Strategies

### our company

Smith Coffey opened its doors in 1972. Since then, we have proudly helped thousands of individuals and businesses grow, manage and protect their wealth.

Specialising in the needs of medical and dental professionals, we offer a complete suite of services to help you achieve your financial and lifestyle goals.

**smith**coffey

make every day a good day



## expertise with a difference

In addition to accounting qualifications, our consultants are RG146 compliant and have completed either the Diploma of Financial Services (FP) , the Advanced Diploma of Financial Services (FP) or the Diploma of Financial Planning . Some have also attained the designation of Certified Financial Planner (CFP). This places our consultants within the 1% of the profession that are authorised to advise on all tax and accounting issues.

## staying one step ahead

With the taxation system frequently changing, it's important to stay up to date and diligently assess how any variations might impact our clients. We conduct regular training sessions to ensure our staff are at the forefront and are immediately aware of any new rulings.

## smart business strategies

We can help guide you through every step of the formation and management of your medical and dental practice, as well as all related compliance matters.

## securing your financial future

We have a client first philosophy that's based around helping you create a secure financial future. This means we take the time to get to know you and your particular needs so that we can make the most appropriate recommendations.

## help when you need it

We are here for the long haul. At every stage in your life and career, you can call on us to help. There will always be someone available to answer your questions and guide you through both opportunities and challenges. If for some reason we cannot talk to you at the time of your call, we will get back to you within 24 hours.

**to speak with a smith coffey consultant  
please call 08 9388 2833.**

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Financial Planning (Investment and Super) advice is provided by Smith Coffey Securities Pty Ltd AFS Licence No. 237971.

Personal Insurance advice is provided by the Smith Coffey Pty Ltd off The Bon Unit Trust AFSL/ACL No. 237972.

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