



TOOHEY REID

chartered accountants | business advisors

Do you want more from your Accountant?

OUR SERVICES

TAXATION

Headed by Stephen Toohey, a recognised taxation specialist, we are able to achieve significant savings by continuing to build our database of successful plans and strategies. A lateral approach often takes us beyond conventional thinking to find solutions that deliver powerful results in a practical and appropriate manner.

- Corporate and Personal Tax Compliance
- Tax Planning
- Business, Investment and Superannuation Structuring
- Finance Structures
- Asset Protection
- Employee Benefits Structuring and Superannuation

ACCOUNTING

- Tailored Financial Reporting
- Superannuation Accounting
- Computerized Accounting Systems Advice and Support (MYOB and Quicken)

We tailor our clients' financial reporting to segregate and highlight meaningful management information.

SUPERANNUATION

DIY or Self Managed Superannuation Funds

We can establish and assist you to manage your own DIY superannuation fund, providing full accounting and audit services. This allows you to take control and can provide wider investment alternatives and advanced taxation and estate planning strategies

WEALTH MANAGEMENT

The reason we feel our work is worthwhile is that our investment advice, acted on early enough, can deliver investors the peace of mind that comes from being financially secure. Not to mention the freedom from being able to afford their long held dreams.

We can advise you in the following areas:

- Financial planning
- Investment reviews
- Personal insurance
- Superannuation

We will assess your current financial position, listen to your goals and then guide you step by step with a written plan tax effectively tailored to create, build and preserve your wealth – without undue risk.

WEALTH PROTECTION

- Strategies to protect your assets from attack
- Risk insurances
- Partnership and shareholder agreements

BUSINESS ADVICE & IMPROVEMENT

We see our role in providing business advice as being similar to a coach's role in a sporting team. Just like a sporting team where most of the work is done out on the field, our clients make it happen out in the business field every day.

- Performance Analysis and benchmarking
- Goal setting
- Budgeting
- Financing requirements, structure and sourcing
- Business planning
- Strategy development
- Systems development
- Succession planning and exit strategies
- Management support and advice

VALUATIONS & DUE DILIGENCE

Headed by Grant Reid, Toohey Reid has been involved in many business valuations, business appraisals and due diligence undertakings. The valuations and due diligence has predominately concentrated in areas where our clients businesses are involved, including:

- Retail operations
- Professional services firms
- Hospitality and tourism operations
- Distributorships
- Manufacturing

The 14 years experience we have gained from our other business advice and taxation services combined with our valuation knowledge and theory allows us to undertake a comprehensive analysis on any small to medium sized business and consequently provide suitable due diligence and valuation reports.

BUSINESS FINANCE

We are in a position to provide financiers with the majority of information they require for finance applications as well as providing you with the appropriate structuring advice to ensure tax deductibility and risk minimisation. As a result we provide our clients with a service where we can source and ask from the banks and financial institutions for:

- Business acquisitions
- Business expansion
- Equipment purchases, leasing, chattel mortgage, hire purchase
- Refinancing
- Commercial and retail property

FRANCHISE SPECIALISTS

We also have a separate division devoted to providing specialist services to franchisees and franchisors. Please contact us for a brochure or visit our website to download one.

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