

# Summary of Services

Moore Stephens Sydney is an expert in provision of advisory services to Individuals. Our highly qualified practitioners, and our specialist chartered accountancy personnel ensure that we provide clients with professional investment advice, executed through well-planned financial strategies and structures.

Included within this document is brief overview of the services provided in our key areas of proficiency, namely:

- Employee Share Plan and Share Scheme Advice;
- Tax and Structuring Advice;
- Wealth Creation advice;
- Retirement Planning;
- Debt reduction Advice
- Sophisticated Superannuation Advice;
- Estate Planning Advice;
- Investment Management;
- Ongoing Advisory Services;
- Investment Structuring Advice; and
- Asset protection.

## Expertise in Strategic Planning

As part of our comprehensive Wealth Management offering, we ensure that a client's investments are structured in the most tax effective and secure way. This process involves structuring investment ownership, borrowings and income flows in the most suitable manner for the client.

We bring to this process a detailed knowledge of taxation laws, investment structures including trusts, the superannuation and pensions environment.

We assess a client total position and are able to provide advice on all tax and structuring issues, and are experts in the provision of strategic sophisticated recommendations.

Our advice is always provided with specific regard to an individuals asset protection requirements and succession issues.

## Expertise in Investments

Within Moore Stephens Sydney Wealth Management we maintain an in-house team continuously researching and analysing investments, strategies and investment opportunities, with a view to creating investment portfolios which offer security, income flows and strong long term capital growth.

We offer clients the ability to invest in:

- Direct share portfolios;
- ASX Listed property portfolios;
- ASX Listed hybrid portfolios;
- Interest bearing securities;
- Wholesale and retail managed fund portfolios;
- International managed funds;
- Self-managed superannuation and pension funds;
- Employer superannuation funds;
- Annuities and Pensions;
- Direct Property; and
- Alternative Asset Classes.

Moore Stephens Sydney

Level 7, 20 Hunter Street  
Sydney NSW 2000  
Australia

Tel: +61 (0) 2 8236 7700  
Fax: +61 (0) 2 9233 4636  
sydney@moorestephens.com.au  
www.moorestephens.com.au

A Member of Moore Stephens International  
Limited Group of Independent Firms

Moore Stephens Sydney Financial Advisors  
are authorised representatives of Moore  
Stephens Sydney Pty Ltd, AFSL Licence  
No 236 886.

## Expertise in Ongoing Advisory and Compliance Services

The ongoing services include continual advice with relation to the investment management of an investment portfolio and the ongoing requirements from a tax and structuring perspective. In addition to these items we ensure that all year-end compliance and reporting requirements are met in an efficient and timely manner.

We will work with you to ensure that all your investment needs are being met, and we will continue to provide advice as to the appropriate streaming of income from different entities. We will continue to keep abreast of the changes in the economic and legislative landscape to ensure you are always provided with relevant and sophisticated advice.

## Expertise In Estate Planning

Estate Planning is probably best defined as "Ensuring that the right assets pass at the right time to the right beneficiaries".

Moore Stephens Wealth Management understand the estate planning issues commonly faced by executives. We can help you to identify your key estate planning objectives, and tailor appropriate strategies.

Estate Planning is rarely as simple as people believe. Moore Stephens can identify any important issues that you may not have considered, and provide guidance to ensure your estate planning wishes can be met as simply as possible.

## Expertise in Employee Share Schemes

As advisors to many corporate clients on designing and implementing Employee Share and Incentive Schemes, in addition to administering such plans on behalf of clients, we offer sophisticated planning advice to executives on how to maximise the net benefit of your short and long term incentives. In addition, we can provide advice of how best to structure your holdings for the longer term in order to achieve your wealth objectives and concerns.

## Moore Stephens Sydney Advisors

[Moore Stephens Advisors are available to help you with all your financial Needs.](#)

To set up a meeting, or obtain advice on any of the noted issues or any other advisory questions, please call:

### Charlie Viola

Director  
Ph. (02) 8236 7798

### Martin Fowler

Director  
Ph. (02) 8236 7776

### Haris Argeetes

Manager  
Ph. (02) 8236 7851

Level 7, 20 Hunter Street  
Sydney NSW 2000

Moore Stephens Sydney

Level 7, 20 Hunter Street  
Sydney NSW 2000  
Australia

Tel: +61 (0) 2 8236 7700

Fax: +61 (0) 2 9233 4636

[sydney@moorestephens.com.au](mailto:sydney@moorestephens.com.au)

[www.moorestephens.com.au](http://www.moorestephens.com.au)

A Member of Moore Stephens International  
Limited Group of Independent Firms

Moore Stephens Sydney Financial Advisors  
are authorised representatives of Moore  
Stephens Sydney Pty Ltd, AFSL Licence  
No 236 886.