



allworths
chartered accountants



Get to know
Allworths Chartered Accountants

A COMPANY COMMITTED
TO HELPING OUR CLIENTS
GROW THEIR BUSINESS
AND FINANCIAL INTERESTS

OUR STORY

Allworths Chartered Accountants traces its origins back to 1897, when we began life as an accountancy and stock and station agent. In fact, we still work with one family that has been a client since the beginning!

Our team of qualified and experienced professionals delivers high-quality, timely and proactive advice, assisted by the latest technology, while always remembering that our company ethos is built on service, loyalty and commitment to our clients through the

generations. We can partner with you for the long-term to help build your empire, or simply assist you in meeting your compliance requirements for the next month; whatever you need, you're in safe hands with Allworths.

Please visit allworths.com.au to learn more about our firm and browse our many informative blog posts. You can also subscribe to our monthly newsletter to keep in touch with all our latest updates.

OUR SERVICES

Allworths is a full-service accounting, audit and personal wealth advisory firm based in Sydney with origins dating back to 1897. With a diverse mix of rural, city and international clients, ranging from individuals to large enterprises, we are used to handling matters spanning all aspects of running a business or growing one's personal wealth.

Whether an individual, family or business, the achievement of your financial goals requires the dedicated support of trusted advisers with expert knowledge spanning accounting, tax, structuring, audit and wealth management.

At Allworths, we believe this advice should be delivered in a proactive, transparent and friendly manner.

With 120 years' worth of history behind us, we have built a forward-looking practice on strong foundations. Each day our team delivers peace of mind to our clients by leveraging our professional expertise, experience, connections and resources to protect and grow the future of their businesses or families.

- At Allworths Chartered Accountants, we work with individuals as well as startup, SME and international businesses on everything from tax planning and tax returns to business structuring, management accounting, compliance and finance - including "Virtual CFO" services.
- At Allworths Assurance & Advisory, we work with SMEs and large enterprises to provide external audit services for compliance and due diligence purposes. Allworths is one of few firms outside of the Big Four to be PCAOB registered, meaning we can offer to carry out audits of US subsidiaries in Australia where the parent entity is listed in the US.
- At Allworths Wealth Management, we help clients define and work towards the financial future they dream about for their families. This includes planning and managing a diversified portfolio of local and international investments, selecting appropriate life insurance cover as well as offering estate and succession planning services to keep your family covered through the generations.

Being the "safe pair of hands" in which our clients entrust their most sensitive information, and most personal financial aspirations, is what motivates us on a day-to-day level. As a team, we operate with the expertise, professionalism and integrity that collectively inspire that level of trust every day.

This way, our clients can get back to whatever they love most with the comfort and security of knowing that their financial future is unfolding in the best possible way.




David Downie

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Partner at Allworths Chartered Accountants

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David is passionate about diligently and proactively attending to his clients' business and personal financial matters, ensuring that they are both protected and well-placed for continued

growth and success. He is a self-confessed car nut, husband and devoted father of three.

He regularly works with SMEs, high-net-worth individuals and investors, executives and company directors as well as Australian subsidiaries of foreign companies. Like many of the clients he now serves, David has helped establish and run numerous businesses of his own. Before Allworths, he was a founding director of a private wealth management company and a partner in several Sydney chartered accounting firms.

David has worked in the accounting profession since January 1996 in taxation and business services roles. He gained valuable tax experience at Price Waterhouse, and then Pricewaterhouse Coopers, prior to assisting with the implementation of the GST at a global investment bank. He has been a member of Chartered Accountants Australia and New Zealand since 1999, is a Registered Tax Agent and a Chartered Tax Adviser.




Mark Copsey

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Partner at Allworths Chartered Accountants

Director at Allworths Wealth Management

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Mark started out in the audit function at Allworths back in 1995 while visiting from the UK. He loved Sydney, and Allworths, so much that he decided to stay and has been with the firm ever since! Having weathered many ups and downs over the years, the one thing that remained constant was his passion

for getting to know and serve his clients. He still holds England close to his heart, along with his football (soccer) and two children.

He assists clients of all sizes and descriptions across the whole business and has been particularly responsible for the growth of Allworths Wealth Management since its establishment in 2009. In this way, he has been able to expand the range of support available to our clients and their families; into investment management, insurance and estate-planning; keeping them protected through the generations. Mark is a Fellow of the UK Association of Chartered Certified Accountants (an affiliate of Chartered Accountants Australia & New Zealand), a Certified Tax Agent, an ASX Accredited Listed Product Adviser and holds a Diploma of Financial Services.

There is nothing Mark loves more in business than being able to visit clients in their offices, shops, warehouses, homes, or on their farms, to understand exactly what they do and what makes them tick. This intimate client knowledge is what enables Allworths to do the quality of work we do with the longevity and loyalty we offer all our clients.

Please contact Mark or David if you would like to discuss any of your business or personal financial needs and explore the full range of support Allworths has made available.

TESTIMONIALS

When choosing an accountant and advisor, we know you would rather hear from some of our clients; we asked them to share what they like most about working with Allworths Chartered Accountants.

“The team at Allworths has assisted me with my financial affairs since 2004, including; personal tax, trust and SMSF matters; as well as the restructuring of my dental practice. I find David, Cynthia and the team to be absolutely reliable, trustworthy and more than capable of achieving optimal results for me. Furthermore, they are communicative and a pleasure to deal with. Given my 14-year association with Allworths, I would highly recommend them to anyone who is looking for a new chartered accounting and advisory firm.”

- George L

“My Allworths partner is an excellent communicator who delivers insightful solutions for me and my business. His team is always focused on strong technical and commercial outcomes, which are delivered in a way that I can readily understand. The Allworths team is heaps of fun to be around and brings “best in class” service to help us stay ahead of our competitors.”

- Greg L

“Having worked in conjunction with Allworths for many years, the key attribute they bring is a personal commitment to client needs. Their response time to queries and requests is excellent and they often respond with added information and advice. This certainly sets Allworths apart from most professional services firms.”

- Peter L

“Our company had been trading in Europe and North America for nearly 10 years before we decided to establish a presence in Australia. Allworths came highly recommended from a business partner in Hong Kong; we heeded their advice and haven't looked back since. Initially, Allworths took care of all incorporation procedures and thus freed up our management team to focus on other important startup tasks, such as finding an office and recruiting staff.

Once business was underway, we decided to continue utilising Allworths' services. These have been comprehensive in nature, covering everything from bookkeeping, BAS filings, payroll tax returns and FBT, to providing ad-hoc advice.

There are numerous reasons why we continue using Allworths. The highlights would be their friendly and professional team, competitive pricing and wholesome approach to looking after their clients, to name a few.


I have no hesitation in recommending Allworths to any other business. Allworths has provided us with a solid foundation to make our Australian company successful from day one and I'm confident their continued support will allow us to thrive for many years to come.”

- Ieuan W


“David and the team at Allworths have been responsible for my family's tax matters for well over a decade. Other professional firms can often treat you as a “number,” but we have never experienced this with Allworths. It is frankly refreshing to deal with an organisation where there is a level of continuity and consistency. The approach adopted by Allworths provides us with a high level of comfort that our requirements are well understood and their recommendations are considered and appropriate to best meet our needs. Allworths has always been responsive to our numerous, and sometimes crazy, ideas over the years. The Allworths team has never failed to guide us on the correct path. We would have no hesitation in recommending Allworths for your accounting and tax needs.”

- Gene L

For further information, please contact us on:

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