



allworths  
wealth management



Get to know  
Allworths Wealth Management

A COMPANY COMMITTED  
TO PROTECTING AND  
CHAMPIONING THE FINANCIAL  
INTERESTS OF OUR CLIENTS

## OUR STORY

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With 120 years' worth of history behind us, the team at Allworths has 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.

We are passionate about being the “safe pair of hands” in which our clients feel comfortable entrusting their most sensitive information and

most personal aspirations. We exist to share in their hopes, dreams and stories; to console, advise and celebrate and to be there for the long-haul every step of the way, no matter what. With a trusted adviser at their side, our clients are far more likely to achieve the best possible outcomes on the road to the financial future that they dream about.

## OUR SERVICES

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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.

*Since inception in 2009, Allworths Wealth Management Pty Ltd has helped numerous high net worth individuals identify their short and long-term investment goals, securing and growing their wealth, in a strategic, proactive and highly communicative manner.*

- 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.

- 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.

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.

## Mark Copsey

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Director at Allworts Wealth Management  
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Mark Copsey, Director at Allworts Wealth Management, is just one of many talented individuals behind the Allworts brand. Mark is passionate about helping clients of all ages to secure their financial futures, protect against the unexpected and ultimately achieve the lifestyle they envision for their families.

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.

Mark has been with Allworts since 1995. He loves working so closely with clients across their business and personal financial affairs and welcomes the opportunity to chat with any interested parties seeking to secure their financial future.





## TESTIMONIALS

When choosing a wealth advisory firm, we know you would rather hear from some of our clients; we asked them to share what they like most about working with Allworths Wealth Management...

*"Having been clients of Allworths for nearly forty years it is impossible to cover all the services they have provided over the years. We lead a very international life with, over that time, investments in the UK, France, Mexico, the USA and, of course, Australia. The investments have also differed including property, chemical manufacture, coffee roasting, and years ago the Australian Nanny School. To find a practice capable of satisfying needs in Australia is good. To find one that helps across borders is rare. There is no doubt that we all miss Stephen but, in our recent experience, the team he has left behind maintains well the Allworths ethic and quality. All our financial affairs including pension and wealth management are in their hands. The best thing. Unlike larger firms one knows that in addition to being approachable they will still be in the role as the years go by. Our daughter is already a client."*

Drs Keith and Jennifer S

*"I have enjoyed a long association with Allworths over several decades now and have always found them to be very approachable and highly professional. More recently, Allworths assisted me with advice on superannuation, estate and succession planning, all of which left me feeling comfortable that all matters financial were in good order."*

*One aspect I particularly appreciate about Allworths is they make themselves so available to you by phone, email or face to face. It's a rare occasion when they're too busy to take your call, promptly answer your email or meet with you at short notice. Indeed, a recent catch up at their new office on Level 18 allowed me to see their fresh open floor plan in action and it was quickly apparent how closely the Allworths team work together and how well they get on!*

*I am pleased to recommend Allworths for accounting and wealth services as they have proven themselves over many years to provide measured and sensible recommendations on taxation and investing."*

Dr Robert H

*"When I first needed an accountant I looked for a small firm which looked after individuals and small businesses. A firm which explained matters in simple terms without resorting to jargon, did not suggest exotic tax schemes, had straight forward, transparent reasonable fees."*

*At the suggestion of two clients of Allworths', I approached them and they have lived up to my expectations."*

*They have assisted in the sale of my small business; established, advised on investments and run my Super fund and attend to tax matters. I find them pleasant, knowledgeable and when the chips were down on a matter their response was both timely and accurate."*

*The aspect I like most about Allworths is that at all levels they are friendly and treat me as a valued client, although I am very small compared with others."*

Mr Peter B

## DISCLAIMER

The content of this brochure is intended to be general in nature and does not take into account your personal circumstances. Before implementing any strategies, we recommend you speak to your licenced financial advisor or solicitor. Allworths Wealth Management Pty Limited (AFSL 457 155) is the Wealth Management arm of Allworths Chartered Accountants.

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