



SERVICES GUIDE






CLIENT CHOICE AWARDS

2020 WINNER


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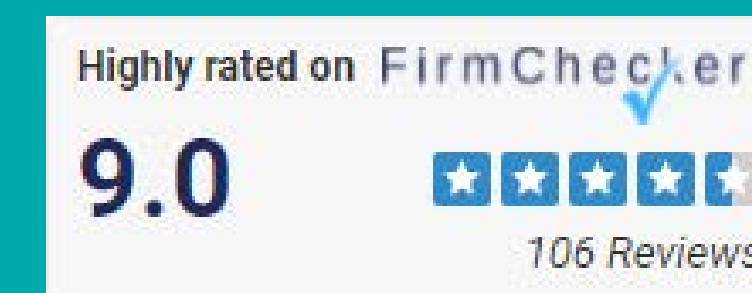
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ABOUT US

Allworths is an award-winning accounting and advisory firm made up of three complementary service lines: Chartered Accountants, Assurance & Advisory and Wealth Management. We're a small and friendly team prepared to assist with all your personal and business financial needs.

We have a long and proud history dating back 120 years; with these strong foundations we have built a forward-looking practice. Today, our company ethos is built on quality service, loyalty and commitment to our clients.

Every day our team shows this commitment by leveraging their professional expertise and experience in order to protect and grow the future of our clients' businesses or families. We act as a trusted adviser and ensure we do everything we can to help our clients achieve the financial goals they dream about, whatever they may be.



MEET MARK COPSEY

**DIRECTOR AT ALLWORTHS WEALTH MANAGEMENT &
PARTNER AT ALLWORTHS CHARTERED ACCOUNTANTS**

Mark joined Allworths in 1995 and has since worked with clients new and old, domestically and internationally. He has been particularly responsible for the growth of Allworths Wealth Management since its establishment in 2009.

Mark enjoys working with a broad range of clients and getting to intimately understand their business needs - whether that means visiting a cattle yard or watching the manufacturing process of bitumen.

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.



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MEET DAVID DOWNIE

PARTNER AT ALLWORTHS CHARTERED ACCOUNTANTS

David has worked as an accountant since 1996, working in taxation and business services roles. He has helped establish and run numerous businesses of his own and has been a partner at several Sydney chartered accounting firms in the past.

David is passionate about diligently and proactively attending to his clients' business and personal financial matters. He regularly works with SMEs, high-net-worth individuals, executives and company directors, as well as Australian subsidiaries of foreign companies.

He has a Bachelor of Commerce and Law, has been a member of Chartered Accountants Australia and New Zealand since 1999, is a Registered Tax Agent and is a Chartered Tax Adviser.



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MEET GRACE SHEN

DIRECTOR AT ALLWORTHS ASSURANCE & ADVISORY

Grace has spent more than a decade in public practice, with extensive audit experience spanning the following industries: manufacturing, property development, retail and wholesale, education, not-for-profit, renewable energy, technology and financial services.

Grace holds a Bachelor of Economics from the University of Sydney and a Master of Advanced Taxation from UNSW.

She is a member of Certified Practising Accountants, an associate member of Chartered Accountants Australia and New Zealand, and is a Registered Company Auditor.



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CHARTERED ACCOUNTANTS

At Allworths Chartered Accountants, we work with individuals, startups, SMEs and international businesses on everything from tax planning and tax returns to business structuring, management accounting, compliance and finance, including “Virtual CFO” services.

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. I would highly recommend them to anyone who is looking for a new chartered accounting and advisory firm.”

- George L

“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 have no hesitation in recommending Allworths for accounting and tax needs.”

- Gene L

“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.”

- Leuan W

The background of the slide features a photograph of the Sydney Opera House, a world-famous architectural landmark. The building's iconic white, sail-like shells are prominent against a clear blue sky with light, wispy clouds. The structure is situated on a peninsula, with the dark blue water of the harbor in the foreground. The image is partially obscured by a white rectangular box on the right side, which contains the text.

ASSURANCE & ADVISORY

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 carry out audits of US subsidiaries in Australia where the parent entity is listed in the US.

ASSURANCE & ADVISORY

“Helen Kaminski designs and markets luxury fashion essentials for the modern man and woman. We are stocked in luxury department stores and selected boutiques globally, crossing five continents and 25 countries. While the company is now owned by a US-based company, the design and brand team still operate from our headquarters in Sydney.

Helen Kaminski has a long association with Allworths, having been our auditor for over 14 years. This was initially working with Stephen and Mark, and then with Colleen and her team for the last 4 years. We understand the compliance requirements of an audit and enjoy healthy upfront discussions on audit, accounting and tax matters as they occur.

We also appreciate the fact that our auditors work around our month-end deadlines and are flexible and approachable.

Having so many geographical locations, including manufacturing and procurement, must present an interesting challenge for Colleen and the audit team, including liaising with auditors from different parts of the world.

Colleen and Grace work professionally with our diverse team and appear to enjoy having the opportunity to interact with our stylists and marketing teams as they plan designs well in advance of the next season.

An ongoing 14-year professional engagement with Allworths demonstrates the value of the relationship to Helen Kaminski.



Allworths has a great professional culture as well as a more reasonable approach to the work-life balance question that many in their industry do not see or achieve. At Helen Kaminski I demand that my team ensure this balance is recognised and so we find a good fit with Colleen and Grace. It is great to work with such a friendly and reliable team.”

- Kim Darling, CEO, Helen Kaminski Australia

A full-page background image of a beach at sunset. The sky is a mix of soft pinks, oranges, and blues. The ocean has gentle waves with white foam. In the foreground, a person stands on the sandy beach, holding a large, dark surfboard. The sand is marked with many footprints. The overall mood is peaceful and aspirational.

WEALTH MANAGEMENT

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.

WEALTH MANAGEMENT

“Allworths 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

“Having been clients of Allworths for nearly forty years it is impossible to cover all the services they have provided over the years. In that time, we’ve had a range of investments in numerous countries. To find a practice capable of satisfying needs in Australia is good. To find one that helps across borders is rare. 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

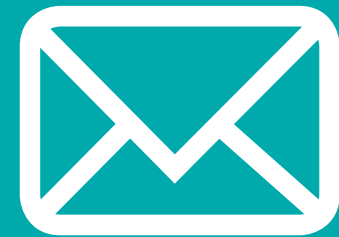
“I have enjoyed a long association with Allworths over several decades now and have always found them to be very approachable and highly professional. More recently, Allworths assisted me with advice on superannuation, estate and succession planning, all of which left me feeling comfortable that all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

FEEL FREE TO REACH OUT TO
US IF YOU HAVE AN INQUIRY
ABOUT ANY OF OUR SERVICES.



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