



Cutcher & Neale

ACCOUNTING AND
FINANCIAL SERVICES

Innovative thinking.
Traditional values.



Our Services

We deliver a full suite of integrated services through our eight specialist divisions.

Accounting and Taxation

We provide clear, practical taxation advice and planning along with preparation of financial statements and management accounts, all based on your particular circumstances and needs.

Assurance

While the financial statement audit is the cornerstone of our service, our philosophy is to gain a deep and intimate understanding of your business.

We then combine this knowledge with our expertise to tailor an audit process that targets your specific risks.

As well as fulfilling compliance requirements, we aim to provide insightful recommendations for the overall benefit of your business.

Business Services

This highly specialised service can take your business to new levels through sound strategy based on key insights.

Our team provides expert business advice, valuations, risk management strategies, best practice, business structuring, franchise and business evaluations.

Business Software and System Solutions

Our team of experts can deliver the financial reporting and management information tools needed to help you make fully informed business decisions.

We specialise in products which range from entry level accounting systems to stand-alone payroll/HR systems and mid-level financial systems.

Finance Brokerage

Whether you need funds for capital equipment, a home, a rental property or any other investment, sourcing finance couldn't be simpler.

With a wide range of finance options to choose from, our Finance team can provide a tailored lending solution to suit every situation.

Investment Services

Our highly experienced investment team devise and implement a comprehensive investment strategy to match your current financial position and objectives.

Your portfolio is built through direct asset acquisition rather than through third-party Fund Managers. Not only is this cost effective, it means you know exactly how, why and where your money is invested.

We then optimise returns by managing your portfolio through our exclusive Portfolio Review Service.

Forensic Accounting

Many disputes involve a complex blend of legal principals and financial implications. We help make sense of the financial aspects of a dispute through clear, concise, impartial advice.

Our team specialises in damage quantification and valuations for litigation and other dispute resolution forums.

Self Managed Superannuation

More people are turning to Self Managed Superannuation Funds as a means of reaching their retirement goals. Self Managed Superannuation enables control and choice over your investments as well as providing a vehicle for various tax and estate planning strategies.

Our Super team has the experience and technical expertise needed to help you make the most of your superannuation.

Our background

Cutcher & Neale was established in 1953.

Today we are one of the leading regional accounting and finance consulting firms in Australia, employing over 80 staff across eight specialist divisions.

We provide expert auditing, accounting, taxation, business and financial advice to a diverse range of organisations and individuals across the Hunter and New South Wales.

Our success and longevity is grounded in the traditional values of absolute integrity, personal service and professionalism coupled with innovative thinking.

Our standards

We hold ourselves to the highest professional and ethical standards. These values are unwavering and are deeply embedded in the culture of our firm.

Our policies and procedures ensure that all issues relating to your relationship with the Firm are treated in strictest confidence.

Our publications

We produce a number of publications that canvas current issues and trends across all disciplines within the firm.

Copies are available on our website.

Our Partners

Robert Taber

BCom, CA, FCA, CFP, SSA

Self Managed Superannuation Division

Bob joined Cutcher & Neale in 1980 and has been a Partner since 1986.

His vision and insight has been instrumental in guiding our evolution from a traditional accounting firm to the multi-disciplined, fully integrated service provider we are today.

Bob's areas of expertise include Self Managed Superannuation, retirement strategies, tax advice and planning, estate planning, tax-effective business structuring and services to medical practitioners.



Ian Neale

BCom, FCA, CFP, SSA

Business Services Division

Son of the firm's co-founder, Geof Neale, Ian joined in 1985 and has been a Partner since 1988.

His wide ranging skills and deep experience are invaluable to all areas of our business.

Ian's areas of expertise include Club and Hospitality industry services, strategic review and risk management, business plans and valuations, business financing, tax advice and planning, property development and construction contract management.



Phillip Smith

BCom, CA, FCA, CFP, SSA

Investment Services Division

Phil first joined the firm in 1986 before leaving in 1988 to work for the Hill Samuel Investment Bank in London. He returned in 1994 as a Partner in the newly created Investment Services Division.

Phil's hands-on experience and breadth of financial market knowledge coupled with Chartered Accountancy skills are unique.

Phil's areas of expertise include portfolio management and investment, sharemarket advice and placement, Self Managed Superannuation, financial planning, retirement strategies and estate planning.



David Carpenter

BCom, FCA, FTIA, AImm, Dip. FS (FP), SSA, SSAud

Business Services Division

David joined the Firm as a trainee in 1987 and became a Partner in 1997.

He has extensive experience in assisting SMEs in the industrial sector with their accounting, taxation and business advisory needs.

David's areas of expertise include business planning, reconstruction and valuation, tax-effective business structuring, business advisory, risk management, franchise consultancy, GST and tax advice and planning.



Mark O'Connor

BCom, CA, CIA

Assurance Services Division

Mark joined the Firm as a trainee in 1992 and became a Partner in 2002.

He is a registered company auditor and specialises in the Not-for-Profit, Health Services and Registered Charity sectors.

Mark's areas of expertise include financial reporting, external audit, business risk and internal control, business process improvement, Forensic accounting, due diligence and business valuations.



Jarrod Bramble

BCom, CA, FTIA, SPAA

Specialist Medical Services Division

Jarrod joined the firm in 1998 and became a Partner in 2004.

A specialist in services to medical practitioners and dentists, he has extensive experience in business development, financial analysis and corporate restructuring across a wide range of industries.

Jarrod's areas of expertise include capital transaction planning, business reporting and KPI development, tax-effective business structuring, business financial modelling, taxation advice and planning, retirement strategies and estate planning.



- **Newcastle**
The Bolton Building
25 Bolton Street
Newcastle NSW 2300
02 4928 8500

- **Sydney**
Suite 1, Level 2, Berry Square
77 Berry Street
North Sydney NSW 2060
1800 988 522



Cutcher & Neale

ACCOUNTING AND
FINANCIAL SERVICES

www.cutcher.com.au