

Investment Services

Our Philosophy to investment

- *Our advice is aimed solely at creating the best possible outcome for the client.*
- *Capital protection is paramount.*
- *Investment assets are strategically positioned*
- *Service and information to ensure better informed decisions, creating peace of mind.*



Our Specialist Services

- Portfolio review service
- Superannuation and rollovers
- Retirement strategies
- Stockbroking facilities
- Online real time pricing and transaction
- Debenture and money market
- Investment placement

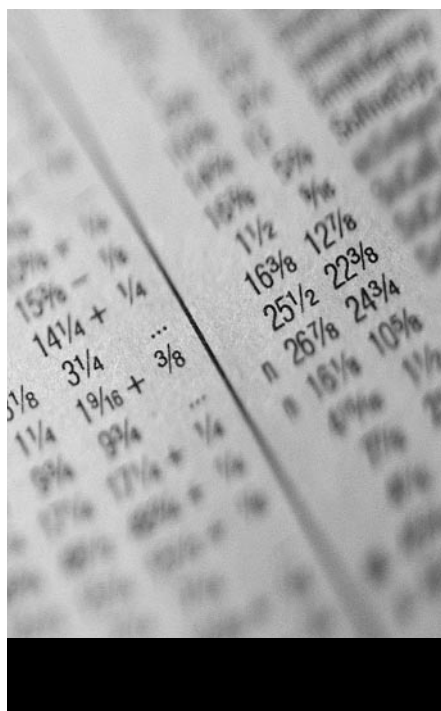
Portfolio Review Service

- Ongoing administration, recording and reconciliation.
- Regular valuation, commentary and advice.

- Formulation of investment strategies.
- Advice on offers and takeovers.
- Research and analysis on leading companies.

Wealth Accumulation Plans

- Structuring your affairs and advising on your personal wealth accumulation program.
- Establishing a dossier on every facet of your accumulation and protection of financial assets.
- Ongoing support and advice.



Cutcher & Neale

CHARTERED ACCOUNTANTS
BUSINESS DEVELOPMENT CONSULTANTS



Your Future

The complex and ever changing financial world demands ongoing vigilance. Your financial future is one of the most important aspects of your life.

Our advisors are members of the Institute of Chartered Accountants in Australia. We believe our qualification ensures the highest professional standards, and commitment to you.

Why the Need

Australia's population is ageing. It is apparent that each individual will need to take control of their own financial destiny.

Government policy, while frequently changing, is designed to encourage people to accumulate sufficient wealth during their working lives to support them in retirement.

Partners

Phillip Smith, CA, ASIA, CFP

- Chartered Accountant.
- Graduate Diploma of Applied Finance & Investment.
- Certified Financial Planner.
- Merchant Banking & Treasury Experience.



Phil Smith



The 1990s provided a period of challenge and high volatility in financial markets, requiring investors to be fully aware of their portfolio risks and returns. The excesses and failures of the 1980s are stark reminders of the need for prudence.

The importance of informed, efficient investment portfolio management cannot be overemphasised. We are addressing this specialised need through Cutcher and Neale Investment Services.

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Associated with

**Deloitte Touche
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