



"I find it most rewarding assisting people to meet their retirement income goals by structuring their superannuation effectively."

phillip smith

expertise & experience

Phillip Smith is a Partner with Cutcher & Neale and oversees Cutcher & Neale Investment Services division.

Phillip is a commerce graduate from The University of Newcastle and a Chartered Accountant since 1986.

Phillip first joined Cutcher & Neale in 1986 before leaving in 1988 to work abroad, returning to the firm in 1994 to be Partner of the newly created Investment Services division.

During this time overseas he worked as a manager in the Treasury department of leading Merchant Bank, Hill Samuel in London before returning to Australia in 1990. To 1994 he had been working in treasury consulting in Australia and South - East Asia.

His hands on experience and breadth of financial market knowledge, coupled with Chartered Accountancy skills is unique.

Phillip regular presents at information briefings and seminars on economic and investment market issues.

Phillip Smith

Partner

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areas of expertise

- > Portfolio Management & Investment Services
- > Self Managed Superannuation
- > Financial Planning
- > Retirement Strategies
- > Estate Planning
- > Share market Advice & Placement

qualifications

- > Chartered Accountant

associations

- > Fellow of the Institute of Chartered Accountants, Australia
- > Certified Financial Planner of the Financial Planning Association
- > Fellow of the Financial Institute of Australasia
- > Specialist member of the Self Managed Super Fund Professionals Association of Australia

about Cutcher & Neale

Established in 1953, Cutcher & Neale is a leading accounting and financial services firm, serving individuals and businesses with highly personalised service and professional expertise. Situated in Newcastle CBD and North Sydney. Consisting of eight divisions, accounting and taxation services, investment services; business services and finance brokerage; self managed superannuation technical services; business software and system solutions; assurance and risk management and forensic accounting. Cutcher & Neale is one of the few firms outside the Sydney area that provides a complete professional services package to clients.