

Superannuation



“Regardless of age, we all want to be sure we can maintain our lifestyle in retirement”

The importance of superannuation is clear to all of us. For many though the rules, obligations and options available are confusing and complicated.

At PKF Mack our specialist Superannuation advisors can help you navigate the complexities of the superannuation environment, meet your obligations and achieve the lifestyle you want in retirement.

Superannuation is one of the most tax-effective ways of saving for your retirement. By investing long-term in a tax effective environment you can build substantial wealth.

Whether you contribute to superannuation personally, through your employer or through your own business, the advantages of investing in superannuation are significant and include concessional tax treatments and the ability to attach insurance benefits.

Our Superannuation team is Partner led and includes senior trained professionals that are available and easy to access at all times. You will have direct access to a Partner and senior manager, so your queries are responded to promptly.

OUR SUPERANNUATION SERVICES

Our highly trained and dedicated Superannuation team can provide expert advice and solutions in relation to:

- Self Managed Superannuation Funds (SMSF)
- Superannuation compliance
- Superannuation audits
- Strategic taxation advice regarding superannuation and pensions
- Estate planning support

OUR APPROACH

What sets us apart is the fact that we take the time to get to know you on a personal level to really understand what is important to you now, and in retirement. Using this detailed information we can then develop a tailored solution for you that achieves your objectives.

We speak in plain English so that you are clear on the outcomes of our advice and your obligations.

Our team also provide you with the support you need to ensure any administration or compliance obligations are clear and manageable - with no surprises.

Introducing our Superannuation Team



TONY MACLEAN

(B.Bus, CA, CTA)

Tony is a Partner in the Superannuation team. He has more than 35 years of experience in advising clients in relation to taxation, business advisory and superannuation.

He has a specialised focus on superannuation and particular expertise in advising clients in relation to self managed superannuation funds.

Areas of Expertise

- Self Managed Superannuation Funds (SMSF)
- Financial planning
- Strategic business and financial advice
- Taxation
- Business advisory



CARL LONGSHAW

(B.Com, CA, CTA)

Carl is a Partner in the Superannuation team. He has more than 15 years experience in advising business owners and individuals with investment and property portfolios.

He partners with his clients to provide advice that is commercial and practical. He has advised clients in a variety of industries including the retail, wholesale, hospitality and property development sectors.

Carl has a keen interest in superannuation and is a Registered SMSF auditor.

Areas of Expertise

- SMSF audit
- Business advisory
- Financial reporting
- Income tax



MATTHEW VAN RIESSEN

(B.Bus, CA, FTIA)

Matthew is a Partner in the Superannuation team. He has more than 30 years experience in many fields of the accounting profession including taxation, business advisory and superannuation.

He specialises in providing comprehensive financial and superannuation advice to clients across a wide range of industries including the pharmaceutical, property, hospitality and engineering sectors.

Areas of Expertise

- Superannuation administration and compliance
- Financial planning
- Business valuations
- Income tax
- Capital gains tax



NEIL GEE

(B.Com, CA)

Neil is a Principal in the Superannuation team. He has more than 13 years experience in advising clients in relation to their superannuation needs.

Neil's focus is entirely in superannuation and manages the day to day running of the superannuation division. He specialises in assisting clients with their compliance obligations for SMSF.

Areas of Expertise

- SMSF administration and compliance
- Retirement planning
- Estate planning

Local, National and Global

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It is in the top 15 largest global accountancy networks and member firms have approximately 2,270 Partners and nearly 22,000 staff around the world. PKF International is a member of the Forum of Firms, an organisation dedicated to consistent and high quality standards of financial report and auditing practices globally. Visit www.pkf.com for more information about PKF International.

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