



CHARTERED ACCOUNTANTS
AND FINANCIAL SERVICES

SERVICES

ACCOUNTING

- processing of financial transactions
- business administration including all statutory requirements
- preparation of monthly management accounts
- drafting of annual financial statements
- preparation of budgets and cash flow statements
- secretarial work for companies, close corporations and trusts

AUDITING

- registered accountants and auditors
- acting as auditors for companies
- the auditing of attorneys' and estate agents' trust accounts
- advice on risk management and internal controls
- acting as internal auditor for companies and public authorities
- special assignments

FINANCIAL PLANNING

- an analysis of your personal financial position
- advice on using the correct business structures
- drawing up of a retirement plan
- putting in place an investment plan
- doing a proper estate plan
- minimising of taxes

RISK MANAGEMENT

- analysing the various risks in your personal life
- analysing the various risks in your business

- advice on and acting as brokers for short term insurance
- advice on various life insurance matters
- advice on medical funds
- other issues

INVESTMENTS

- helping you to prepare a personal investment plan
- managing your share portfolio
- advice on unit trusts and management of it
- advice on property investments
- money market and cash investments
- advice on offshore investments

TAXATION

- implementing tax planning strategies
- income tax administration
- VAT administration
- administration of Payroll taxes
- planning for Estate Duty and CGT
- other issues

WILLS

- drawing up of wills
- advice on bequests
- acting as executor or trustees in deceased estates
- proper systems for safekeeping of wills
- regular assessment of wills
- other issues