

# Services for Law Firms & Practitioners

**We provide expert accounting and advisory solutions to help legal Firms and Practitioners achieve financial success**

At Nexia Sydney, our specialists understand the unique challenges and opportunities of the legal sector. We partner with Firms and Individuals to overcome these challenges, identify opportunities, and make informed decisions to achieve business and personal financial goals.

## Solutions for Legal Firms

Nexia Sydney provides practical, proactive and cost-effective solutions through our full suite of Tax, Advisory and Business Services.

Our partner-led approach means you benefit from a dedicated team to provide you with a holistic and personalised service.

We can support your Firm manage its finances, optimise operations, ensure compliance with regulations, and provide strategic advice to support ongoing growth and profitability through:

- Annual accounting & tax compliance
- Tax Planning & strategies
- Succession planning
- Budget & forecasting
- FBT
- Virtual CFO solutions
- Understanding ATO obligations re partnership & service trust income
- Trust account audits
- Navigating service trust distributions
- Corporate secretarial
- Entity structure advice
- M&A & Restructuring
- Profitability analysis
- Guidance on allocation of professional firm profits

## Create, Manage and Grow Your Personal Wealth

We partner with legal professionals to create effective wealth creation and tax compliance strategies to optimise your financial position, expand career opportunities, and plan for your ideal retirement lifestyle.

Our team of wealth management specialists understand the legal sector, and provide a holistic approach through financial planning, superannuation advice, personal insurance protection advice, and mortgage and estate planning advice.

Our Partner Services offering for Lawyers and Barristers includes:

- Annual tax compliance for family groups
- Structuring and entity establishment
- SMSF establishment and annual compliance
- Superannuation contribution advice
- Wealth building advice
- Cashflow forecasting & projection
- Debt management
- Income protection insurance
- Investment and portfolio construction advice
- Understanding of and experience with practice software including Barbooks, Practice Evolve, Aderant & Filepro
- Tax advice, planning & strategies
- Competitive finance and lending solutions

## Key Contacts



**Stephen Davis**

Partner

t +61 2 8264 0707

m +61 412 128 377

e sdavis@nexiasydney.com.au



**Christine Atencia**

Partner

t +61 2 8264 0655

m +61 425 342 207

e catencia@nexiasydney.com.au



**Darren Chinnappa**

Partner

t +61 2 8264 0649

m +61 406 626 053

e dchinnappa@nexiasydney.com.au



**Amy Jones**

Associate Director

t +61 2 8264 0765

m +61 450 635 633

e ajones@nexiasydney.com.au



**George Wilcox**

Associate Director

t +61 2 9164 0867

m +61 400 366 515

e gwilcox@nexiasydney.com.au



**Yianni Tsathas**

Associate Director

t +61 2 8264 0654

m +61 420 702 824

e ytsathas@nexiasydney.com.au

# Who we are

Nexia Australia is a full-service accounting and advisory firm supported by global links to Nexia International.

We exist to help people and businesses grow and become successful, and this drives our dedication to providing quality, personalised services for individuals and firms in the legal sector. We know that while we are in the business of accountancy and advice, we are actually in the business of people — because we believe that when great people are aligned, great things happen.

We are responsive, progressive, and proactive so that our clients, large or small, receive outstanding value and benefit from our expertise.

## Nexia Australia's clients

- Small to medium enterprises
- Large private company groups
- For-purpose (Not-for-profit) entities
- Subsidiaries of international companies
- Publicly listed companies
- Market leaders in different sectors of Australian businesses

## Why Nexia Australia

### Our global network

Nexia offers advisory, tax and audit services worldwide. When you choose Nexia, you get a more responsive, more personal, partner-led service.

**\$2.9bn**  
Fee income for 2023

**624**  
Offices globally

**26,149**  
People worldwide

**123**  
Countries

### A culture of success

We hire a diverse range of individuals with the ability to ask the right questions, listen actively and analyse deeply to spot missed opportunities.

### We'll get you there

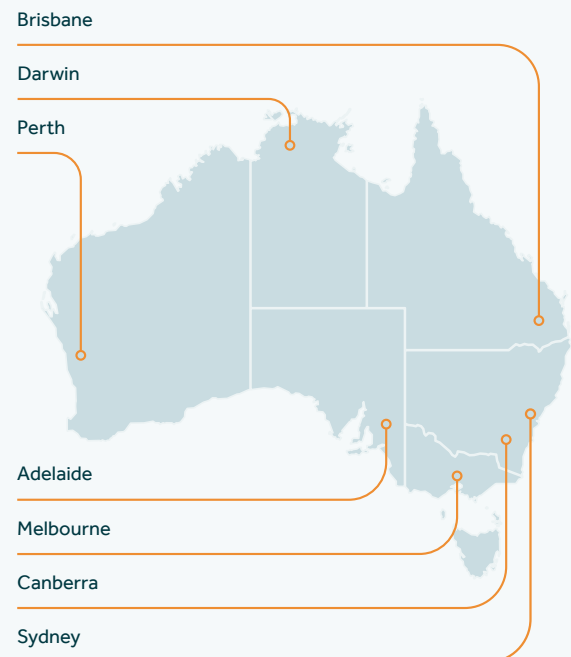
We're a top 15 global network, already on the ground in over 120 countries, and have offices in every mainland state and territory in Australia.

### The specialists you need

We offer over 30 sector and service specialties, from legal and professional services, healthcare, and many more.

### Ready for what's next

We equip our team with the vital skills to thrive in tomorrow's world, so we can guide you to success, no matter what your personal or business goals.



## Contact us

info@nexiasydney.com.au  
nexia.com.au