David Robson

I find it inspiring to work closely with my clients to help them achieve their personal, family and business goals. I and my talented team have extensive experience and training in business development, financial planning and wealth creation strategies. The successful implementation of cost effective, practical and personalised strategies is of the essence of professional reward.

Background:

David established the firm in 1988 and as the Managing Director he heads the Executive team who develop the operational and strategic company directions.

David is also responsible for a portfolio of businesses and high net worth clients. With over 25years experience in public practice his extensive experience in accounting, audit, taxation, superannuation and financial planning enables him to offer clients a comprehensive consulting perspective that maximises wealth creation through both business development and personal financial planning strategies.

Professional qualifications and memberships:

Registered Tax Agent, Registered Company Auditor, Authorised Representative Count Wealth Accountants, Bachelor of Commerce

Member of the National Tax and Accountants Association, Fellow of CPA Australia Fellow of the Taxation Institute of Australia. Fellow of the Institute of Chartered Accountants in Australia (Specialist Financial Planner desigantion) Fellow of the Australian Institute of Management, and Member of the FPA.

Experience & Expertise:

Wealth Creation & financial Planning
Retirement planning, superannuation, Self-Managed Super Funds, direct share and managed fund investment advice, wealth protection and geared loan investments.

Specialist taxation advice :
In respect to the tax consolidation regime, acquisitions and mergers, tax structuring of sale of business, family succession of businesses, tax aspects of estate planning, property developments taxation, GST and CGT.

Forensic accounting assignments:
Family Law investigations and valuations, Federal Court proceedings, expert witness testimony, Valuations for Shareholders and Partnership agreement, preparation of insurance loss claims, calculation of the loss of profits due to particular business events, and fraud and theft investigations quantifying and legal briefing.

Business Development Services:
Business planning, corporate strategy, expansion, property syndication, franchising, statutory and compliance services to clients, directorships and board advising, Strategic Reviews and Implementation, Family Business planning and Generational transfers