

WHAT'S
IMPORTANT
TO YOU, IS
IMPORTANT
TO US.



At CAAA, we help people
and businesses maximise
their commercial lives.



TAILORED SOLUTIONS. SPECIFIC ADVICE. PREMIUM SERVICE.

CAAA is a full-service accounting and advisory firm. Recognised by the Australian Financial Review in consecutive years as a top 60 firm, we proudly offer our clients bespoke solutions through strategic expertise.



Our approach

We are diverse enough to offer services across the spectrum from tax advisory to estate planning, yet personal enough to ensure each client has a dedicated account manager as a direct point of contact. This ensures quick delivery and clear communication. We call it CAAA Commercial Concierge.



Our global reach

CAAA are trusted advisors to private business throughout Australia. Our local offices are in Sydney CBD, Parramatta and Penrith, with a dedicated Asia-Pacific Division in-house. As the Sydney member for INPACT (A Top 20 award winning global alliance of accounting firms), we also have direct access to experts in over 60 countries.



Our commitment

We take on clients for life and carefully select the best advisor for each client. Our advice is holistic helping us maximise the commercial lives of all our clients.

MAKING TAXATION LESS TAXING.

Our extensive business knowledge and diverse industry insight will help you find the most appropriate solutions and tax strategies for your individual needs and specific business goals.



How we can help

We aim to maximise commercial success in the most convenient and cost-effective manner, leaving you with more time to maximise your personal wealth and focus on the growth of your business.

- Tax minimisation advice
- Representation in tax audits
- Tax objections and reduction of general interest charges and penalties
- Capital Gains Tax strategies and reduction
- Expert advice business restructure and transactions including M&A taxation
- Asian tax experts including Hong Kong, China and Taiwan and tax residence
- Business, corporate, and global taxation specialists
- Family office and high net worth tax advice



Audit and Assurance



Working in partnership, we ensure your company remains compliant with government guidelines and regulations through careful analysis and audited financial reports.

- Public company audits
- Large private company audits
- Foreign controlled company audits
- Charities and not-for-profits
- Accounting system advice including internal controls
- ASFL and SMSF audits
- Trust account audits
- Audit committee advisors
- Expert advice on the implementation of accounting standards
- Drafting general purpose financial reports for filing with ASIC

LOCAL KNOWLEDGE WITH A GLOBAL PERSPECTIVE.

We add value and build lasting relationships with businesses who are going places. We are specialists in providing boards, CEO's, senior management and government clients with practical advice and a hands-on approach. Our team's expertise and contacts ensure your goals turn into achievable, strategic plans.



Corporate Advisory

Our clients are comprised of private companies and family groups across all sectors of the Australian economy.

- Restructures, turnaround, and crisis management
- Mergers and acquisitions
- Capital raising
 - Debt
 - Equity
- Business divestment
- IPO advice
- Board level advice and reporting
- Finance director service
- Government Grants including research and development
- Asset protection strategists
- Complex estate planning advisors
- Business improvement advisors
- Holistic commercial advisors
- Business valuation
- Business and KPI monitoring including cash flow and budgeting support
- Strategic and business planning
- Design and implementation of bespoke financial and management accounting systems on all major software platforms
- Regular management accounting and reporting
- Outsourcing back-office service including fully-featured CFO; Accounting and administrative support



Corporate Finance

Through our wholly owned subsidiary, Meridian Business Finance, we support entrepreneurs in growing their wealth, expanding their business portfolios, and helping them secure the best funding option by providing tailored finance solutions.

- Bespoke private and commercial banking
- Commercial finance
- Asset finance
- Overdrafts
- Property development finance
 - Emergency lending
 - Factoring
 - Trade finance
- Residential lending
- Investment loans
- Access to private lenders
- Hard and complex finance specialists
- Tax effective debt
- Asset protective debt



Wealth and Risk Management

Whether it be planning for a comfortable retirement, investing to achieve quantifiable savings goals, or reviewing the performance of your investments, we can help you build your wealth portfolio, plan for retirement, and protect your assets.

- Self-managed Superannuation Fund (SMSF) experts
 - Investment advice
 - Budgeting and cash management
 - Property, shares, and managed fund investment
 - Access to boutique private investment syndicates
 - Local and international bonds
 - Advanced tax and debt strategies for SMSF
 - Risk Management and Insurance
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QUALITIES TO STAND BY



CAAA lends a helping hand to those in need through a collaborative Corporate Social Responsibility program between CAAA and CAAA Staff called CAAA C.A.R.E.S. Or ‘Creating A Responsible Equal Society’.

We unite CAAA Staff across multiple locations by taking part in paid volunteer days throughout the year, contributing to the work of charitable organisations in Australia.



Values to live by

COMMITMENT: We build lifelong relationships with our clients.

INTEGRITY: We uphold the highest standards of sincerity.

ACCOUNTABILITY: What we promise, is what we deliver.

TEAMWORK: We work as a team to problem solve.

ASIA-PACIFIC SPECIALISTS

The emerging economic strength of the Asia Pacific region means that more companies are making it a priority to do business in this area. Our specialist division, CAAA Wong and Mayes, helps Australian businesses and investors to do business in China and Hong Kong, and for those businesses abroad to do business in Australia.

Managing what matters

We manage the affairs of large foreign companies, wealthy resident and non-resident families and their local Australian investments. Our experts provide advice and strategy on:

- Income source issues
- Tax residency
- Structuring for optimum tax efficiency
- Experts in Hong Kong and China tax and Asian taxes
- Specialists in relocating wealth to Australia
- Investment and asset protection

**Tell us what's important to you
and we can help you move forward.**

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