# Accountants & Business Advisors



# Grow Protect Preserve

Partner with a firm that understands business, the value of your hard work, and can show you how to grow, protect, and preserve your business and private wealth, so that it's safe and secure for generations to come.

# Our Firm

### Our Firm

Who We Are

We are seasoned Accountants, Business Advisors and Strategists who focus on providing quality, high value strategic advice that makes commercial sense.

What We Do

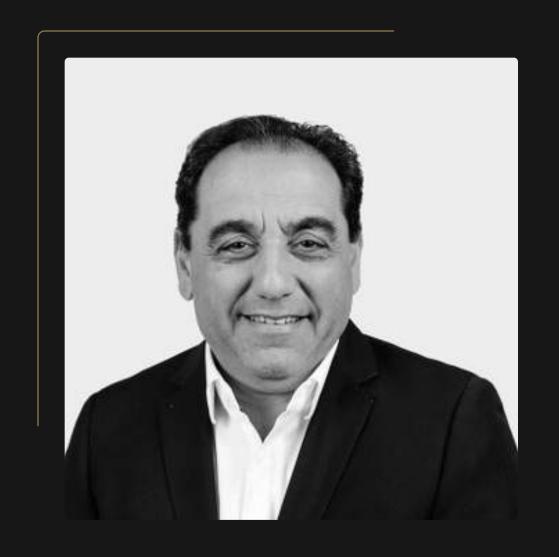
We help business owners to improve performance, gain efficiencies through better business practices and build a fortress around their business and personal wealth.

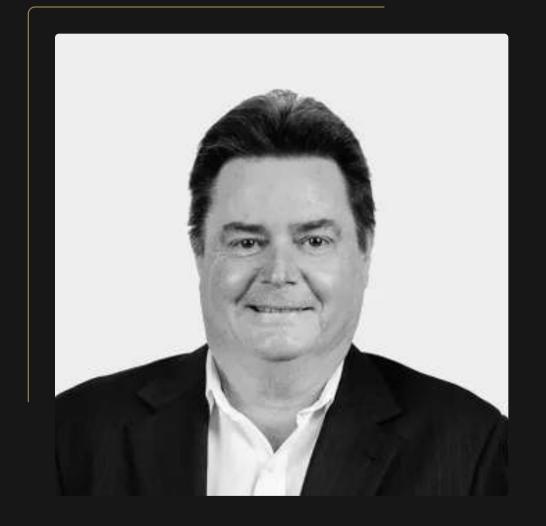
**How We Do It** 

We utilise cloud-based technology which allows us to work on a collaborative basis with business owners, their administrative teams and external advisors.

# Our People

## Our People









Samuel Testa
Director - Tax & Legacy

John Welch
Director - M & A and Consulting

Nathan Testa
Director - Digital Transformation

Louise Lamb

Director - Business Analytics

# Capabilities

## Capabilities



#### **Accounting & Financial Reporting**

Outsource your entire accounting and finance division to gain efficiencies and reduce cost.

Learn more →



#### **Digital & Technology**

Digitalise your business and engage with new customers and reach new markets.

Learn more →



#### **Asset Protection & Estate Planning**

Utilise the latest asset and estate planning technics to protect your business, wealth and legacy.

Learn more →



#### **Mergers & Acquisitions**

Attain market dominance through carefully structured mergers and acquisitions.

Learn more →



#### **Debt Advisory**

Use diverse funding options to improve cashflow, grow sales and reduce operational costs.

Learn more →



#### **Self-Managed Super Funds**

Flexibility, investment choice, and control over the management of your superannuation benefits.

Learn more →

## Capabilities



#### **Succession & Exit Planning**

Craft an exit strategy that reflects the hard work, time, and effort you've invested in your business.

Learn more →



#### **Tax Planning & Advice**

Understand and address tax risks, whilst successfully managing your tax obligations.

Learn more →



#### **Virtual CFO**

Access to an advisor and strategist that can act as your sounding board.

Learn more →

## Contact

## Contact

Phone 1800 279 482

Email hello@samueltesta.com.au

Office Level 25,

100 Mount Street,

North Sydney NSW 2060

Website samueltesta.com.au

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