

We share your passion for good long term business relationships. So we work with you to ensure the best engagement methods and most practical solutions are found, for both your client and your own reputation.

At Covisory we enjoy working as team players with other like minded advisors. The result is Covisory Partners frequently work as specialist consultants to Chartered Accountants, Lawyers, Bankers, and Migration Consultants.

We generally like to work with you, but we also enjoy being lead consultants in our own specialist areas. So this may mean our opinions and papers are presented by your team in order to maintain an existing client relationship, or equally after approval by you, we may work directly with the client on specific detail.

Our clients tell us that they value our commercial experience and our ability to cut through to the heart of the matter. They appreciate our strategic insight and they value our ability to come up with creative solutions to difficult problems.

Be reassured by our strong grasp of the technical detail - based on years of experience, together with the latest research. You will be able to rely on us to maintain an oversight of your clients strategy implementation and to let you know when they've drifted off course. You will enjoy our fresh, straight-forward approach.

Wealth | Tax | Business

CONSULTING + PRIVATE CLIENTÈLE

Please contact us to find out more about our services.

TELEPHONE

+64 9 307 1777

EMAIL

nigel@covisory.com

sally@covisory.com

Covisory
PARTNERS

CONSULTING

Wealth | Tax | Business

Covisory
PARTNERS

Offering real expertise...

TAX ADVICE

Taxation Opinions

- Expert first opinion
- Second opinion to - incumbent CA, IRD, or other tax specialist
- Professional presentation of opinion

IRD Disputes

- Discovery / Dispute Management
- Opinion writing
- IRD communications
- Representation at all levels

Migration Facilitation

- Migration to and from NZ, assisting corporates and individuals
- Mitigating direct and indirect tax exposure
- Establishment of appropriate structures taxation/business/trusts
- Trust and asset planning
- Establishment of bank accounts
- Employment and remuneration packages
- Exit strategies
- Expatriate Taxation

CONSULTING +
PRIVATE CLIENTÈLE

BUSINESS STRUCTURES

Growth

- Mergers and acquisitions
- Review of existing structures
- Strategic planning and reviews
- Maximising the value of a business

Family Businesses

- Succession Planning
- Generational succession issues
- Wealth Protection
- Exit strategies

Governance and Directorships

- Composition advice
- Directorial experience

TRUSTS AND TRUSTEESHIPS

Trusts

- Establishment of trusts
- Professional trusteeship services
- Review of existing structures
- Trust Migration to and from NZ

Foreign Trusts

- Establishment of New Zealand domiciled Foreign Trusts - NZFT's
- Establishment of New Zealand Look Through Companies NZLTC's
- Establishment of appropriate structures

COVISORY PARTNERS PRIDES ITSELF ON BEING SMALL, HIGHLY SPECIALIST, AND BOUTIQUE IN ITS APPROACH.

Nigel Smith

BCom, University of Auckland; MTaxStudies (1st Class Honours) Chartered Accountant (C.A.)

Nigel is a well recognised specialist in Taxation, Commercial Advisory and Trust services and has over 25 years experience advising on taxation and business issues.

Nigel is currently an accredited member of The New Zealand Institute of Directors, he is also a member of The Society of Trust and Estate Practitioners.

Nigel has assisted on numerous advisory panels, and has been a court appointed specialist.

Sally Herbert

BCom, University of Auckland

Sally has over 25 years experience working for a wide range of small and medium sized private companies in financial accounting, marketing, research and IT fields.

Sally's background is support and lecturing specialising in Expert Systems, System Security and Business Computing.

Sally's primary areas of focus are Accounting, Trusts, Marketing, Research and IT as well as one off client projects.