

At Covisory we know the value of being discrete and protecting your privacy. We listen, and we work with you to ensure the best long term solution is found for your individual circumstance and your future goals.

Our clients tell us that they enjoy our fresh, straight-forward approach. They appreciate our strategic insight and they value our ability to come up with creative solutions to difficult problems. They are reassured by our grasp of the technical detail – based on years of experience, together with the latest research. They rely on us to maintain oversight of their strategy implementation and to let them know when they've drifted off course.

As well as working directly with our private clientele, at Covisory we also enjoy working as team players with other like minded professional advisors. The result is, Covisory Partners frequently work as specialist consultants or partners on private projects to Chartered Accountants, Lawyers, Bankers, and Migration Consultants. If you would prefer us to work along-side your existing accountants or business advisors we are quite happy to do so.

Please contact us to find out more about our services.

Wealth | Tax | Business

CONSULTING +
PRIVATE CLIENTÈLE

Covisory
PARTNERS

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**PRIVATE
CLIENTÈLE**

Wealth | Tax | Business

Covisory
PARTNERS

A wealth of expertise...

We start where other accountants finish.

TAXATION

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 and advising both 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

Covisory Partners and Private Accounting provide independent advisory service. We are Chartered Accountants and members of the New Zealand Institute of Chartered Accountants. Covisory Partners and Private Accounting do not offer financial planning, investment, or financial advice as defined in New Zealand law.

FAMILY BUSINESS ISSUES

Planning and Advice

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

Governance and Directorships

- Composition advice
- Directorial experience

Growth

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



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

ACCOUNTING

Private Accounting

- Highly personalised service, extending well beyond just preparation of financial statements
- Proactive and responsive advice
- Geared to high-net-worth clients
- Identification and mitigation of issues

Financial Tools

- Asset Ownership summaries
- Diagrams of Trust structures
- Wealth Summaries