

# Financial and insurance services

## More than just advice

The financial and insurance sector helps individuals protect themselves and their property against risks and allows individuals to grow their wealth.

Like many sectors, financial and insurance service businesses can face challenges. Including building trust with clients, adapting to regulatory changes, safeguarding data, predicting market developments and maintaining compliance frameworks.

At Nexia Australia, our experienced team is dedicated to the development of tailored strategies, processes and advice. Helping you overcome these challenges and provide the best service to your clients while optimising financial and insurance operations with executive risk management, financial management and business processes.

**Our financial and insurance specialists at Nexia Australia have provided businesses with high-quality accounting and advisory services for decades.**

## Advice

- Sector regulations
- Compliance requirements
- Business and management strategy
- Treasury advice
- Process improvement
- Business modeling

## Services

- AFSL annual audits
- Financial statement audits
- Preparation of financial statements
- Tax planning
- Performance management
- Financial reporting
- Fund accounting
- GS007 compliance
- ASAE 3402 compliance
- GS 003 compliance
- Risk management
- Tax compliance

## Cultivating success in a constantly evolving sector

At Nexia Australia, we understand the challenges of balancing compliance frameworks, risk management and process systems with high-quality customer service that builds trust between you and your clients.

No matter the economic or market conditions, you need a partner you can trust. A partner who understands the complexity of your service delivery.

Nexia Australia can advise you on best-practice systems and controls, provide you with auditing services to ensure your compliance and develop in-depth cash flow and expense controls, along with other financial management and business support.

Our team remain at the forefront of key regulatory issues, often liaising with key regulators and licensing bodies such as ASIC, ATO and APRA.

We believe proactivity is at the heart of our partner-led service, and we're committed to staying ahead of the curve to deliver the best possible outcomes for you.



### **Taylor Brammer Landscape Architect Pty Ltd**

Iain Brammer, Director

**"Nexia have my best interests at heart. They listen, they understand, and actively work in unity to find the best outcomes."**

## Who we are

Nexia Australia are your dedicated personal and finance business partner.

Leveraging a global network of over 497 offices spanning 118 countries, we possess demonstrated capabilities and an in-depth knowledge of the sector.

Our experienced team can offer the insight, advice and support you need to maximise efficiencies, recognise opportunities and achieve your overall personal and business goals.

With decades of sector experience, we offer a carefully integrated suite of services, encompassing taxation, superannuation, business advisory, and audit. Nexia Australia provides comprehensive support to help you meet your statutory obligations and empower you to focus on what matters most.

## Contact us

Contact your local Nexia Advisor to discuss how we can help you and your business.



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