

Alison Lacey



Director

Sydney, NSW

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Qualifications

- Certificate of Public Practice, Chartered Accountants Australia and New Zealand
- Graduate Diploma of Chartered Accounting, Chartered Accountants Australia and New Zealand
- Bachelor of Business (Charles Sturt University)
- Advanced Diploma of Financial Services (Financial Planning), Kaplan Professional
- Justice of the Peace

Memberships

- Chartered Accountants Australia and New Zealand
- Registered Tax Agent
- Taxpayers Association

Background

Alison is a Director with the firm and joined Ecovis Clark Jacobs in 2003, when the firm she led merged with Clark Jacobs. With over 25 years of experience in public practice, Alison provides business services and tax advice to a large number of small business clients particularly in the fields of medicine, dentistry and law. Alison also works with high net worth clients and has an interest in self-managed superannuation structuring and advice. Ecovis Clark Jacobs has more than 100 medical and dental practices as clients and Alison advises the majority of those practices on all matters related to their business and personal affairs.

Alison works extremely closely with her clients and places particular emphasis on cash flow planning and the integration of business and personal affairs in order to maximise a client's wealth generating ability.

Significant Matters

Medical and Dental Industry – Advising on the set up, purchase or sale of practices, including structuring, use of service trusts and asset protection. Advice on management of practices and cash flow issues.

Debt Structuring – Advice on structures to use for asset protection, tax deductibility and flexibility in relation to business and property purchases.

Superannuation Advice – advice in relation to superannuation planning and pension structures particularly for self-managed super funds.

Areas of expertise

- Cash flow and tax management
- Business and investment structuring for asset protection
- Superannuation and pension planning
- Self-Managed Superannuation Structuring
- Management Accounting
- Tax Advisory
- Rental property advice
- Debt Structuring