

## Andrew Harvey

DIRECTOR

phone (03) 9909 7460

mob 0417 162 182

andrew@summerhillfm.com.au



*summerhill*  
FINANCIAL MANAGEMENT

### Education

Bachelor of Business - Accounting (Monash University)

Diploma of Financial Planning – RMIT

### Professional Memberships

Institute of Chartered Accountants in Australia (ICA)

Fellow of the Taxation Institute of Australia (TIA)

Member of the Superannuation Professionals Association of Australia (SPAA)

### Other Associations

Board member of the Karl Duldig Studio (small public non-for-profit museum)

### Experience

Andrew has over two decades experience in providing taxation, accounting, superannuation and wealth-management strategies to families, executives and professionals — whether they be partners in professional firms or operating their own businesses.

Andrew began with the Melbourne Tax Division of Arthur Andersen in 1987. Initially involved in all areas of personal and corporate taxation, in 1989 Andrew chose to specialise in personal taxation and rose to the position of Senior Manager.

In 1996 he took up the role of State Taxation Manager and National Tax Consultant of boutique wealth advisers, Davey Financial Management. After the firm's sale in 1999, Andrew began Summerhill Financial Management, later concurrently returning to Arthur Andersen's private client division. In 2000, he was promoted to Director, and continued to provide taxation, accounting, superannuation and wealth-management services to the firm's clients and the partners of Arthur Andersen and Andersen Consulting (later Accenture).

Andrew moved to Ernst & Young as a Director in 2002, before joining Martin Goodrich & Associates in 2003, where he held the position of Principal. In 2005, Andrew joined the Myer Family Office Ltd, providing taxation, accounting, superannuation and wealth-management services to its ultra high net-worth clients.

In 2008, Andrew established himself full-time in Summerhill Financial Management, so he could continue to build long-term client relationships by providing personalised, high quality taxation, superannuation and wealth-management services.

### Areas of Expertise

Andrew specialises in providing advice in the following areas:

Taxation – income tax, capital gains tax, GST and employee-related taxes

Accounting

Structuring advice

Superannuation and retirement planning

Estate planning