SMITH and THOMAS
FINANCIAL and BUSINESS SERVICES

History

In 1964, John Thomas established a sole trading accounting practice in a rapidly growing industrial region to provide a range of financial services to individuals and businesses.

The business was engaged by several small manufacturing firms and quickly extended its services to cover a range of personal taxation matters along with general support on company taxation.

With the growth in business, Jocelyn Smith joined as a Partner in 1967.

Between 1967 and 1983, the business continued to grow and had developed strengths in business financial services. When the Australian financial markets were deregulated in 1984, Thomas and Smith became an incorporated company. The business moved to a new location in the Sydney CBD and implemented a business plan to develop an integrated financial and business services company that would cater for all individual and business needs.

Mission

To deliver personalised financial and business management solutions that enable our clients to reach their goals.

Corporate Values

Professionalism

Smith and Thomas place high standards on service delivery, to ensure all services are based on accurate and current knowledge that complies with legal and moral expectations.

Integrity

Smith and Thomas will maintain a reputation for integrity requiring all employees to commit to high community standards.

Sustainability

Smith and Thomas are committed to contributing to a carbon neutral environment.

Lifestyle

Smith and Thomas will endeavour to provide staff with opportunities to ensure a work/life balance.
Key dates since 1984:

- 1985  Introduced Smith and Thomas Actuarial Services
- 1988  Invited Maher Economic Research to join the Company to provide extended economics based services to clients
- 1989  Established Commercial Legal Services division
- 1990  Appointed first CEO
- 1991  Established Financial Planning and Investments division
- 1995  Established Management Consulting and Technology Services division
- 2000  Recognition as the foremost consulting professionals in managing Y2K issues for Public Sector
- 2002  Total employee numbers reached 1000
- 2004  Funds under management in Financial Planning Division reach $A4.9 billion
- 2006  New Resources Consulting division formed to use integrated services for accessing resource boom
- 2007  Introduced Recruitment Services division with vision to be the preferred supplier of recruitment services into the accounting and financial sectors