

Don't brave the financial markets without Quicken



The individual:

Many never experienced the glory days of investment banking. For those drenched in today's financial market bloodbath, the 1980s may as well as have been the Middle Ages for all the good it does now.

Finance and investment are about fundamental viability and value creation. Good timing doesn't hurt either, particularly for clients who often have put their financial future into the hands, and judgement, of an 'expert.'

Phillip Meyer's clients have come out ahead. Well ahead.

Meyer orchestrated major deals at regular intervals throughout the 1980s: Setting up bond issues; syndicated loans in the international capital markets; a strategy which attracted some \$5 billion in investment funds for the ANZ Banking Group; establishing the derivatives market and raising \$220 million for Robert Holmes a Court's Bell Resources, to name just a few.

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Phillip Meyer

The challenge:

Born and raised in Sydney, the 58-year-old industry veteran now resides in Wellington, NZ, his hands no less full than they were in decades past... they're just juggling different projects and commitments.

Meyer fills director or chairman roles at no fewer than a dozen organisations in Australia and New Zealand, some finance related, some not. Plus, there's many more commissions and committees he and wife Jane give their services to.

Still, he maintains an extensive portfolio of business and personal interests as well as a vested interest in world financial markets. Quicken's Home & Business financial management software makes sure he's never out of touch.

The solution:

“You shouldn't invest in stocks unless you've bought Quicken first,” says Meyer, who was an integral member of the finance committee which brought the 2000 Summer Olympics to Sydney. “It's a great product: Great for the user, great for the accountant.”

Meyer uses the software's comprehensive reporting capabilities to generate tax summaries, income and expense reports, monitor stock performance, compare investments and much more. Quicken Home & Business also provides the flexibility to work in multiple currencies, simplifying the accounting process for Meyer's accountants charged with balancing the books for his wide array of Australian and New Zealand interests.

In addition, he generates invoices and reconciles investment accounts.

Amongst the software's many strengths, Meyer adds, is its superior service when compared to the many corporations who claim to be unable to quantify their returns to investors until quarterly balance dates.

“Why can't the corporates do it, when Quicken tells me instantly?” says Meyer of company returns. “I just couldn't live without Quicken day-to-day and dependence builds loyalty.”

Quicken Home & Business 2009 is the premium version of the new Quicken 2009 product line. In addition to a wealth of reporting, savings and expense features, it includes Reward Card Tracking to monitor how many reward points have been earned through credit card purchases. The software's new Carbon Footprint Calculator gives users an indication as to their personal impact on the environment while the FIDO Superannuation Calculator is the easy way to show how an individual's choices impact their superannuation over the long term.

For further information about this case study, contact customerservice@reckon.com.au or 1300 784 253