

SMSF ADMINISTRATION SERVICES

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Helping your
clients take
control of their
retirement

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smsf+options

SUPERANNUATION | SPECIALISTS | ACCOUNTANTS

WWW.SMSFOPTIONS.COM

SMSF ADMINISTRATION



The best possible outcomes when it comes to superannuation.



The popularity of Self Managed Superannuation Funds (SMSFs) has certainly picked up pace in recent times. The desire to have a comfortable retirement is clear.

smsf+options may be the newest administrator on the block, but our people definitely are not, so we can confidently get you the best outcomes for your clients.

GUIDING FINANCIAL PLANNERS

We frequently work with financial planners by helping you and your clients get the best possible outcome when it comes to superannuation. This is achieved through a number of ways:

- + Joint meetings with your clients
- + Keeping you as the key contact
- + Providing you with behind the scenes technical support
- + Conduct in-house training for your staff at your premises
- + Identify opportunities for you and your clients

MAINTAINING RELATIONSHIPS

We will help you maintain your client relationships through the provision of timely, quality advice. We recognise the importance of you keeping your clients up to date, so we'll keep you in the loop with what is happening in the industry

HOW WE CAN HELP

We can help you from the onset and strategise with you on the following:

- + Pensions
- + Transition to retirement
- + Re-contribution
- + In-specie contributions
- + Family succession planning in the fund
- + Estate planning
- + Small business CGT concession

We can also assist with investment structuring, including:

- + Permitted investments
- + Borrowing
- + In-house assets
- + Complex structures

OUR APPROACH

We'll keep in regular communication with you and provide you with feedback of any opportunities to implement strategies that will benefit your clients. We will also provide you with some real life case studies of recent achievements for our clients, to assist you in identifying new opportunities yourself.

Our involvement with your

clients would be either on a one-off basis, when they need specific specialist advice, or on an ongoing basis through preparation of their annual compliance work.

Rest assured that we will communicate any strategies for your client directly to you, and let you decide the best way to approach your client with the opportunity.

SPAA MEMBERS

Our super team is highly knowledgeable of their specialism and as such are members of SPAA, the pre-eminent body for SMSF Professionals in Australia.

THE EXTRAS

Having a local, dedicated super team means that you will not only benefit from our knowledge and expertise, you will also receive a number of additional perks. We can provide a range of free in-house seminars and newsletters which discuss the latest changes in super.

THE NEXT STEP

To find out how smsf+options can assist you, or for further information on our administration services, please contact Guy Wuoti at smsf+options.

He will be happy to arrange a free initial meeting with you and your clients so we can get a deeper understanding of your requirements.

GUY WUOTI

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