

Lillian Li SSA[®]

ASSISTANT MANAGER

SMSF Management



Lillian has been an SMSF specialist accountant for more than five years. She started her career at Findex and then Blaze Acumen before joining BG Private in 2021. She has been an Assistant Manager since 2023.

She works with clients to formulate smart superannuation strategies that help them achieve long-term financial security. She can provide detailed information on the use of SMSFs as a vehicle to create, protect and enjoy wealth in retirement.

With her SMSF specialist background and SMSF Specialist Advisor (SSA[®]) qualification she can advise on superannuation strategies and provide guidance on estate planning.

As an Assistant Manager of our specialist SMSF division, she manages the team to ensure all SMSFs are compliant, and that administration matters are handled efficiently, accurately, and on time.

She remains in constant communication with clients to ensure any questions are answered and that they feel comfortable that their affairs are in order.

Lillian loves spending time with her German Shepherd and cat. She also loves to go on long drives in regional Victoria.

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Qualifications

- Bachelor of Commerce (Hons.)
- SMSF Specialist Advisor (SSA[®])

Memberships

- Member of Chartered Accountants Australia and New Zealand (CA ANZ)
- Member of the Self-Managed Super Fund Association (number 56334)

Highly regarded in

- Audit compliance requirements associated with these investment types: Property investment, listed and unlisted shares, foreign currency, gold and silver, and collectibles
- SMSF matters



For Today, Tomorrow & Beyond.

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