



Superannuation is one of the most important considerations when it comes to retirement planning. It enjoys significant tax concessions, and is a vehicle to create wealth for retirement and the next generation. A Self-Managed Super Fund (SMSF) can be integral to this, and we can help you manage your fund with our SMSF compliance and administration services.

## Who we help

These are some of the groups we help:

- ✓ Professionals with surplus disposable income
- ✓ People in the pre-retirement stage (50+)
- ✓ Self-funded retirees
- ✓ Business owners

## How we can help

The compliance and auditing aspects of maintaining an SMSF are increasingly complex. Extensive professional knowledge is required to ensure that your SMSF complies with the relevant legislation, including the Superannuation Industry (Supervision) Act 1993 (SISA) and the latest auditing/accounting standards.

Our specialist team has substantial practical experience and can administer your SMSF, ensuring it complies with legislation.

We can source a suitable independent auditor to confirm things are run properly.

## Our approach

To start with, we will review your current financial position to advise you on the suitability of an SMSF for your situation. We will provide extensive information and explanations of the pros and cons. If we conclude that an SMSF is a good fit for your current and future situation, we will assist you in establishing your SMSF and transferring of your current superannuation to your newly established fund.

We ensure your fund complies with the relevant ATO regulations and audit requirements, and work with you to ensure ongoing compliance. We endeavour to comply with all the relevant ATO lodgement deadlines, and remain available to answer your questions every step of the way.

To help you evaluate your fund's investment results, we provide ongoing investment reports and we can also collaborate with your Financial Advisor to ensure they have all the information they need.



**BG Private's service, advice and support is impeccable. Highly recommended!**



## What we do

- ✓ Provide SMSF administration services, including setup and ongoing reporting; preparation of annual financial statements, tax returns, balance transfer reporting, GST reporting; preparation and lodgement of quarterly BAS and annual GST returns
- ✓ Ensure your SMSF is compliant and assist the independent auditor with the annual audit requirements
- ✓ Assist with the transfer/rollover of your existing retail fund to your new SMSF
- ✓ Assistance with transition to retirement
- ✓ Assist with the setup of the limited recourse borrowing arrangement
- ✓ Provide administrative support in relation to superannuation in the event of a divorce
- ✓ Advise on pension suitability and eligibility, and the preparation of pension documentation
- ✓ Retirement and estate planning advice relating to superannuation
- ✓ Advice in relation to non-standard asset investments and their compliance with the Superannuation Industry (Supervision) Act 1993 (SISA)
- ✓ Advice on contribution limits and pension obligations
- ✓ Assistance with revaluation of assets as required by SISA
- ✓ Review of trust deed, investment strategy, death benefit nominations and asset titles in accordance with SISA
- ✓ Notification of important changes to statutory requirements for SMSF trustees
- ✓ Preparation of all statutory documentation in accordance with SISA

## Why choose us

- We can explain the maze of options within superannuation to help you find the best path forward
- We can determine the most effective and appropriate ways for you to get the most out of your SMSF
- We can clarify your investment philosophy as it pertains to your SMSF
- We can offer an integrated solution that implements strategies across superannuation, tax planning and retirement planning
- We are personable, approachable and straightforward
- We offer quick turnaround times and work to lodgement deadlines
- We can introduce you to Financial Advisors who can advise if an SMSF is right for you

**For Today, Tomorrow & Beyond.**

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