

Self Managed Superannuation Funds (SMSF)



“ We provide locally based services to ensure your personal information is protected ”

Creating and maintaining an SMSF may be right for you if you are seeking more control and flexibility over your financial future.

Our expertise can help you decide if an SMSF is the right fit for you. We can assist you every step of the way from establishing an SMSF to the ongoing administration required to ensure it is compliant.

Trustee advice and support

We will keep you and your trustees updated with the evolving superannuation environment and the rules and regulations.

Our SMSF experts remove the burden from maintaining an SMSF and aim to provide you with a cost-effective and hassle-free service. We will lead you through the regulatory environment to ensure you maximise your retirement benefits and are aware of all the opportunities available to you.

Administration

We proudly deliver locally based and in-house services. It is important that you have peace of mind when it comes to the privacy of your information and the quality of service.

Services we offer

- Administration and Compliance, including tax returns, financial statements preparation and lodgements
- Facilitating Annual Independent Audits
- Fund and trust deed establishment
- Investment advice
- Review of investment strategy
- Pension establishment
- Tax and strategic advice

