



SMSF SERVICES:

- Provision of factual information about superannuation, including explaining the different superannuation choices and contribution limits.
- Provide 'execution only' SMSF set up services, however it is preferred that a client has already received licenced advice recommending the set up of the SMSF.
- Recommend a corporate trustee versus individual trustee for a SMSF.
- Provide factual advice about the value of consolidating superannuation assets into a single fund.
- Provide assistance to a client to roll-over assets into a SMSF upon client instructions.
- Advise a client about which assets can be contributed to a superannuation to establish a SMSF, provided it is only for the sole purpose of ensuring compliance with the SIS Act.
- Advice on administration and operational issues for the SMSF.
- Provide compliance advice (for the sole purpose of ensuring compliance) e.g. in house asset ruled, modifying contribution levels due to changes in SG
- Provide factual information on insurance risks associated with changing superannuation funds.
- Provide tax advice on implications for superannuation contributions.
- Provide advice about the tax consequences of commencing a pension.
- Providing tax advice about the consequences of commencing a TTR strategy.
- Administratively set up a pension from the SMSF upon receipt of client instructions.
- Provide advice in relation to the purchase and sale of property and other forms of real estate.
- Advice on SIS Act compliance in a fund audit.
- Advise an employer or employee client what choice of funds is and how it can be implemented
- Provide advice on the investment requirements/restrictions of the SIS Act (e.g. limitations on in-house rules).
- Value the assets within a superannuation fund.
- Provide a pro forma generic investment strategy for a client with appropriate disclaimers, provided it falls within the broad asset allocation exemption.
- Provide a client with calculations on the minimum or maximum pension amounts for a superannuation fund.