

SELF MANAGED SUPER FUNDS



Be Prepared

Self Managed Superannuation Funds (SMSFs) are the fastest growing segment in the Australian superannuation industry. A Self Managed Superannuation Fund gives you greater control over how your superannuation is invested, enabling you to better direct and manage your retirement future.

SMSFs, whilst providing you with flexibility and many other benefits, are complex and have specific legislative, administrative and auditing processes which must be followed.

Our Approach

At Hindmarsh McDonald we recognise the importance of clients having control of their future. Our ability to provide a complete SMSF offering for our clients enables them to be informed, feel comfortable and make decisions with certainty about their financial future. We also understand the issues and complexities involved in establishing and managing a SMSF fund and can guide you through this process and ensure your fund is continuing to work for your needs.



“ Hindmarsh McDonald = Self Managed Super Funds Experts! They told us everything we needed to know and have **helped us** with every step along the way ”

The Hindmarsh McDonald team works collaboratively to ensure all aspects of your SMSF are managed and that the fund is working towards achieving your overall long term goals.

Our Solution

Hindmarsh McDonald can provide the complete SMSF solution for the lifetime of your fund. Our specialist SMSF advisers have been providing clients with dedicated, specific SMSF advice for many years.

We are able to not only offer you expert advice in the implementation and ongoing management of your SMSF fund, we can also provide the mandatory administration, auditing and reporting services through Hindmarsh McDonald Chartered Accountants.

Our SMSF Services:

Regular Strategy Review (annually or as agreed with your advisor) including:

- Reviewing of your current position
- Reviewing of your goals and objectives
- Monitoring the effectiveness of your investment strategy in achieving your future goals and objectives

SMSF Specific Advice including:

- Roles & responsibilities of trustees
- Investment strategy including assistance with implementation and product/investment recommendations (where appropriate/required)
- Ongoing management of your SMSF
- Adding members to your SMSF
- How to handle payout of an existing member when leaving the fund

Professional Advisors Liaison

- Accountants (if external to Hindmarsh McDonald) – for accounting, administration and auditing
- Solicitors – for trust deed review, preparation of legal documents governing the activities of the SMSF
- We can also work with any other existing advisors you may have to ensure all of your needs are addressed

Administration Services

- Trust Deed updates
- Reporting & Accounting Services
- Arrange independent audit of the fund and Actuarial Certification

Ensure your SMSF is compliant

- Hindmarsh McDonald will ensure you are aware of any existing and proposed legislation changes that may affect your SMSFs
- Hindmarsh McDonald can give advice on maximising the funds potential and remaining compliant with regulations

Priority Access to Hindmarsh McDonald Team including

- Specialist SMSF adviser
- SMSF Accounting Team
- Client Services

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Creating a path for your successful and secure future