

SUPERCONCEPTS

Australia's Leading Self Managed Fund Specialists



SUPER ASSIST

Helping with the changes
that affect your fund



Is anything more constant than change?

Few things indeed. Which is precisely why you need a service that's reliable when change occurs.

'SuperAssist' helps you take care of any additional administration and documentation for your Self Managed Superannuation Fund as and when you need it.

It's a great assistance in keeping your fund running efficiently, smoothly and free of distraction – allowing you to direct more time and attention to making your fund more profitable and secure.

SuperAssist includes:

- Trust Deed Upgrades – It's vitally important to maintain compliance with the Superannuation Industry Supervision Act 1993 (Cth) and Regulations. For example, recent rule changes have effected tax planning, income stream strategies and even estate planning issues. Upgrades to your trust deed, when required, may help you avoid costly errors.
- Changes to Trustees, Founder and new and/or terminated Members
- Documentation and Calculations needed to commence an Income Stream (Pension)
- Income Stream (Pension) Commutations
- Interim Accounts (SuperAccounts) if required in determining Income Stream capital value or Death Benefit Payments
- Ongoing Income Stream (Pension) Calculations and Reporting requirements
- Eligible Termination Payments and Roll-overs
- Instalment Activity Statements and Business Activity Statements

We can help you with important changes in regulatory requirements – and provide help in documenting those changes into the structure of your fund when necessary.

Cost

Please refer to our separate fee schedule.

Find out about the complete suite of Super Concepts services

In addition to SuperAssist, we offer a selection of helpful and professional service modules. You and your fund may benefit from using just one or even all. Whatever you decide, it's great to know that your Super Concepts service will be delivered with expertise honed by 20 years as Self Managed Superannuation Fund specialists.

To discuss our SuperAssist service or if you would like more information on how our suite of Super Concepts specialist services can be tailored to your individual needs,

Call 1800 625 644

or email your details to info@superconcepts.com.au to arrange to speak to a consultant.

Super Concepts Pty Ltd
PO Box 182, Forest Hill VIC 3131

Super Concepts Pty Ltd (ABN 67 007 437 907) is a Corporate Authorised Representative of ING Financial Planning Pty Limited (ABN 18 003 318 330, AFSL 260520).

www.superconcepts.com.au

Ask us about:

SUPER START

Fund establishment made easy

The expert guidance, advice and professional service you need to ensure your fund gets off to a great start.

SUPER PLAN

Fee-for-Service Financial Planning

Let our financial experts help you map a strategy and a plan for success.

SUPER TRACK

'24/7' Online Portfolio Administration

Service – includes SuperStart and SuperAccounts

This end to end service gives you all the benefits of SuperStart and SuperAccounts plus the ability to track your fund's progress and performance online 24 hours a day, 7 days a week, via daily updated reports on portfolio valuation, actual asset allocation, member reporting, contribution information and more.

SUPER ACCOUNTS

Year end reporting service

SuperAccounts is a specialty service providing comprehensive year end reporting including financial statements, member reporting, fund audit and income tax and regulatory returns that are required annually for a Self Managed Superannuation Fund.

SUPER ASSIST

Helping your fund stay flexible and up to date with change

SuperAssist can help you with the important regulatory changes and document these changes, when necessary, to ensure your fund meets legislative and audit requirements.

SuperAssist includes expert help with Trust Deed Upgrades, ETPs and Roll-overs plus professional guidance and assistance in commencing an Income Stream (pension).