



60 Second Health Check

We are proactive and forward thinking to ensure our clients receive the best possible advice when it comes to their retirement savings. If you answer 'no' to any of the questions below, you need to speak to us!

- Yes No Do you have a documented plan for what happens if one or more members in your SMSF become incapacitated?
- Yes No Do you have an Enduring Power of Attorney in place for each member?
- Yes No Do you have a Special Purpose Corporate Trustee for your SMSF?
- Yes No Have you considered how your member balances affect your non-dependents?
- Yes No Have you had advice on reversionary pensions?
- Yes No Is your Trust Deed less than 3 years old?
- Yes No Are your death benefit nominations current and still appropriate for your circumstances?
- Yes No Do you have a current investment strategy?
- Yes No Are you familiar with the changes to contribution caps and how they are relevant to you?
- Yes No Do you know when you convert your fund to a tax free environment?
- Yes No Do you know how your current member balances are split/allocated between tax free and taxable components and how that impacts your death benefit payout?
- Yes No Are your tax free components being separated and preserved where possible?
- Yes No Do you know what a re-contribution strategy is?

For an obligation free consultation, please call us on 1300 032 020

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