

Self-managed super, expertly managed.

SMSF set-up, administration and audit arrangement for trustees who want control over their retirement savings, without the paperwork.

Led by an accredited SMSF Specialist Advisor (SSA®)

Hardeep Singh is accredited by the SMSF Association and is also a Registered Tax Agent, MIPA and FTI.



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What we do for your fund

1 Setting up your SMSF

- ✓ Explaining the costs, responsibilities and options
- ✓ Trust deed and choice of individual or corporate trustee
- ✓ ABN and TFN registration and ATO election
- ✓ Fund bank account and electronic service address
- ✓ Investment strategy documentation
- ✓ Rollovers from existing super funds

2 Running it every year

- ✓ Annual financial statements and member statements
- ✓ SMSF annual return lodged on time
- ✓ Independent audit arranged with a registered SMSF auditor
- ✓ Contribution and cap monitoring
- ✓ Pension set-up and minimum payment calculations
- ✓ Transfer balance account reporting

Keeping trustees compliant

- ✓ Investments must meet the sole purpose test
- ✓ Related-party dealings must be on arm's-length terms
- ✓ Keep the investment strategy reviewed and documented
- ✓ Records kept and returns lodged on time

We use BGL and Class Super, and keep you informed about rule changes such as Payday Super and updated contribution caps.

Free 15-minute consultation

Talk through your situation with a registered tax agent, at no cost and with no obligation.

Book online at supertax.com.au or call
(03) 7074 8818

4.8 ★ from 50 Google reviews · TPB Registered Tax Agent 26183620

Talk to an SMSF specialist

PHONE (03) 7074 8818
EMAIL info@supertax.com.au
OFFICE Suite 1, 7 Bridge St, Werribee VIC 3030
HOURS Mon-Fri 9am-6pm · Online until 8pm

General information only; it doesn't consider your personal circumstances. Liability limited by a scheme approved under Professional Standards Legislation.



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