

Self Managed Superannuation



Perks.

Integrated business services

Self-managed doesn't mean
you're on your own

Heading in the same direction

Self Managed Superannuation Funds (SMSF) have become an extremely popular way of investing for your future. They offer the benefits of putting you in control of your investment strategies and assets and helping you to avoid charges and commissions often associated with a third party.

SMSFs however, can be restrictive in terms of investment options and can be subject to strict reporting and compliance obligations. That's where Perks comes in.

At Perks, we'll help you grow and simplify your SMSF and make sure all your obligations are met, so you can spend your time making the most of your future. We'll do this with all your financial goals in mind using our own staff in our own office so that you can contact us anytime.



At Perks, we're experts in a number of key areas including Accounting, Taxation, Audit, Finance, Wealth Management, Business Advisory, Personal Insurance and Superannuation. When we offer advice in any of these areas, we make sure it all adds up.

The same applies for your Self Managed Superannuation Fund. We'll always consider your entire financial situation before offering advice. We make sure that all the different facets of your financial world are working together in precise synergy to produce the best possible result. This holistic approach is what sets us apart from other accountants. It is the kind of service you deserve. And it makes sense.

This means when we are setting up, administering and managing your SMSF we'll have the experience and knowledge in-house to answer any of your questions immediately, saving you time and money.

One Stop Superannuation Shop

Superannuation can be complicated. And even though you may have chosen to go down the SMSF road, that doesn't mean you have to figure it all out yourself. At Perks, superannuation is one of our specialties, we can offer you the most experienced and qualified staff to assist you in setting up, administering and managing your SMSF as well as to answer any questions you have along the way.

Whilst our ability to administer your super fund is second to none, we offer so much more.

When we made the decision to specialise in Self Managed Super Funds, we wanted to provide you with all of the services you may need when using a SMSF as a part of your investment and wealth management strategy.



Set Up

- Application and registration of all Australian Tax Office requirements (Tax File Numbers, Australian Business Numbers, Goods and Service Tax, Pay As You Go)
- Organising a complying Trust Deed
- ETP Rollover Statements
- Advice on the benefits and costs of a SMSF

Administration

- Preparation of financial accounts
- Preparation and lodgment of Tax Returns
- Preparation of all minutes required to ensure the fund is complying
- Conduct an audit
- Request for Actuarial Certificates (if required)

Management

- Assist with Tax Planning
- Organisation of an investment strategy
- Preparation of annual pension calculations and documentation
- In house financial planners to review your current investments to ensure you achieve your financial goals
- Coordinate Risk Insurance correctly to maximise deductions and minimise tax
- Review and manage Estate Planning to ensure assets are passed to nominated beneficiaries tax effectively
- Review and advise on Asset Protection to ensure your assets are best protected from potential liabilities or creditors

Areas of Specific Expertise

- High level strategic superannuation advice and strategies
- Tax effective retirement streams
- Implementation of specific superannuation strategies such as instalment warrants

Why Perks?

The Perks Superannuation Team will make the job of managing your own superannuation just a little bit simpler. And with our integrated financial approach, you'll know that your superannuation investment strategy is in line with all of your financial goals.

We'll make sure you comply with all legal obligations and tax and regulatory requirements so that you know that everything you put into your SMSF will pay off in the future.



Thanks for taking a moment to read about how we can help you with your Self Managed Superannuation Fund.

Whatever your financial goals or superannuation needs, give us a call on 8273 9300.

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