

The SMSF Network:

Who should you seek to engage and when?

Legal	Compliance & Administration	Investing	Advice	SMSF Association
Who				
<ul style="list-style-type: none"> • Lawyer • Legal document provider 	<ul style="list-style-type: none"> • Accountant • Administrator • Auditor • Actuary 	<ul style="list-style-type: none"> • Financial advisor • Stockbroker • Online platforms 	<ul style="list-style-type: none"> • Financial advisor • Accredited SMSF specialist adviser 	<ul style="list-style-type: none"> • The independent professional body representing the SMSF sector.
Role / Function				
<ul style="list-style-type: none"> • SMSF establishment services • Trust Deeds • Death benefit nominations • Powers of Attorney • Wills 	<ul style="list-style-type: none"> • Create financial reports • Conduct tax services • Conduct annual SMSF audit • Conduct actuarial exempt pension calculations • Ongoing daily admin 	<ul style="list-style-type: none"> • Investment allocations • Insurance considerations • Asset class advice, eg property, listed shares, ETFs 	<ul style="list-style-type: none"> • Set up/establishment • Key life stages or changes advice • Retirement planning • Contribution advice • SMSF borrowing advice • Potential investment allocations • Pension advice 	<ul style="list-style-type: none"> • SMSF information • Support to find the appropriate Specialist via the Find a Specialist search function • Events • Tools to assist in the management of your fund
When				
<ul style="list-style-type: none"> • When setting up an SMSF • Reviews • Estate planning 	<ul style="list-style-type: none"> • Ongoing • Annually • Information on SMSF law 	<ul style="list-style-type: none"> • Ongoing 	<ul style="list-style-type: none"> • When setting up an SMSF • When a key life event occurs • When seeking advice on SMSF strategy • Estate planning 	<ul style="list-style-type: none"> • Ongoing

