



SMSF News and Strategies Series

Presented by:

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Specialising in Financial Planning and Accounting

Episode 72 – The latest SMSF News

In this episode, we discussed the latest SMSF news.

Here are the **Key Points** in this episode:

- Update from the ATO and some tax strategies for SMSF's
- Fund status change if SMSF returns are late
- Excess TBC determinations – ATO double counting – Timing issues
- Common year end issues
 - Loans to related parties
 - Not meeting minimum pension criteria
- SMSF Estate planning
 - Deed, pension docs, DBN
 - POA
 - Reflect your wishes, AND executed correctly AND in accordance with the deed
- BCG SMSF service, trustee access, app

Keep your lodgments up to date. Regularly review your fund and stay on top of compliance issues, review estate planning. For our clients SMSF update will be out shortly - keep an eye out in your inbox. As always, we are happy to talk about your super and your circumstances. If anyone is interested in a strategy meeting, please contact us via our website www.buscgroup.com.au and we can give you a call.