



SMSF Strategy Series

Presented by Chris Reed, Director of Business Concepts Group
CPA, FPS SMSF Specialist Advisor

Episode 8 - Overview

In this final episode, Chris covers off why a health check is a good way to get started with taking your fund to the next level, and why a general review of your fund is the first thing to do.

For our attendees of the SMSF Strategy Sessions, this will supplement the topics covered in that course and is also a great refresher for any point in time. If you have not attended one of our SMSF Strategy Sessions, this may whet your appetite and we will see you in person soon.

The SMSF Strategy Session Course is a 3 hour session aimed at taking your SMSF to the next level and get the maximum benefit out of running your fund. SMSF's are becoming more and more popular and many funds just operate at a basic level. The course will educate trustees as we go through a number of strategies that will improve your fund. We keep numbers for the sessions small so there is plenty of interaction and opportunity for questions and discussions.

If anyone does have any inquiry whatsoever about their SMSF - looking to have it reviewed or wants to come in for a health check, please contact us. We are passionate about SMSFs and more than happy to talk to trustees about their particular fund.

Please feel free to listen to the episodes as often as you like and we encourage you to share it around with family and friends. Also, if you could do us a favour and jump into iTunes and give the show a rating, we would really appreciate it.