



SMSF News and Strategies Series

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specialising in Financial Planning and Accounting

Episode 43 – The Strategies to consider and Issues to Review in relation to the Super changes

In this episode, we talk about the strategies to consider and issues to review in relations to the super changes. Some of the new rules are a little bit complex and as the law changes trustees should review their super strategies.

A summary of the discussion:

- Ability to make large contributions for the 2016 financial year
- Non-concessional contribution cap \$100,000 from 1st July 2017
- Strategies to maximise super balance
- In specie contributions
- Re-contribution strategy
- Spouse re-contribution
- Review salary sacrifice arrangements – new caps
- Review TTR's
- If exceeding 1.6-million-dollar cap then roll out or roll back
- Draw minimum pensions, additional payments as lumps sums
- No segregated method for SMSFs – actuary certificate required

It is time to review your SMSF in light of these new super rules. If you would like some assistance with your SMSF strategies, please contact the office www.buscgroup.com.au.