



SMSF News and Strategies Series

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Episode 44 – A Year End Review for your SMSF

In this episode, we talk about a year-end review for your SMSF and the key areas to look at. We are half way through financial year and it's a good time to review your SMSF on how it is tracking, have a look at any compliance issues, investment strategies and key documentation. We discuss:

- General compliances issues – from audit, or a review transactions undertaken
- Investment strategies
- Key documentation review
- Gearing
- Contribution caps
- Pension payments
- Estate planning

There has been a lot going on with super so take the opportunity to have a quick review of your fund. We can certainly help with the full review of your fund and advise on any action that you should be taken. Contact our office via our website www.buscgroup.com.au.