



SMSF News and Strategies Series

Presented by:

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CPA, FPS SMSF Specialist Advisor

Guest Host:

Sarah Power, Director of Business Concepts Group
specialising in Financial Planning and Accounting

Episode 60 – Year End Planning for your SMSF

In this episode we talk about the financial year end planning before your SMSF the things you need to be aware of and some of the strategies that you need to consider also the TBAR which is the new reporting we have in the new SMSF regime.

Key Points:

- TBAR Reminder
- Contributions – concessional and non-concessional
- TBC – Limit non concessional
- Spouse contribution – \$37,000
- Co contribution – Investment strategy review, including insurance
- Market valuations
- 2017 lodgment
 - Extended lodgment date of 30th June
- Compliance issues
- Minimum pensions
- TTR Max 10%

30th June will zoom up quickly and make sure you are on top of everything. As always we are happy to talk about your super and your circumstances if anyone is interested please contact us via our website www.buscgroup.com.au and we will give you a call.