



# SMSF News and Strategies Series

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## Presented by:

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## Guest Host:

**Sarah Power, Director of Business Concepts Group**

Specialising in Financial Planning and Accounting

## Episode 75 – The year in review

In this episode, we discussed the year in review

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

- Election result
  - No major super changes, especially labours franking credit policy
- ATO looking at investment strategies
- Downsizer contributions
- TBAR
  
- Investment strategies
  - Gearing, franking credits, property
- Contribution strategies
  - Concessional (inc. carry forward), spouse, co-cont, re-contribution
- Non-concessional
- Estate planning

That is, it for 2019. Take the opportunity at year end – may not have time pre- Christmas, but in January to review fund, review strategies and get some advice. We will be taking a break in January but will be back in February with our next episode. 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](http://www.buscgroup.com.au) and we can give you a call.