

Presented by:

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Episode 100 – Year end documentation review and sticking to the principals for investment success

In this episode, we discussed year end documentation review and sticking to the principals for investment success.

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

- DIN - Australian Business Registry Services - ABRS - Unique identifier
- Halving of minimum pension drawdowns for another financial year. - ongoing volatility
- Investment strategy review
- Deed review
- Reserving
- New pensions
- TBAR - quarterly or annually
- Estate planning of the fund - who will control the fund
- Death benefit nominations - Hill v Zuda Pty Ltd
- Notice of intent, and acknowledgement
- Market volatility - principals for investment success

Make sure your yearend strategies are executed before 30 June, and all relevant documentation put in place. If anyone is interested in talking through strategies, please contact us via our website www.buscgroup.com.au and we can give you a call.