

Presented by:

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Episode 109 – Year End SMSF Planning

In this episode, we discussed year end SMSF planning.

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

- TBAR reporting changes - from 1.7.23 all funds 28 days after end of quarter
- TBC indexation - double indexation to \$1.9m- 1.7.23

- Minimum pension payments

- Contribution strategies
- Concessional - \$27,500. Carry forward. Reserving.
- Non-concessional - use of bring forward, re-contribution, co-contribution. Reserving
- Co-contribution - \$42k to 57k. Must have employment income of at least 10% of total income.
- Spouse contribution - \$37k, \$3k=\$540 rebate

We are currently conducting SMSF planning meetings, if you would like to book in a time for a planning session and to review your fund please let us know. As always we are happy to talk about your super and your circumstances. If anyone is interested in having a chat, please contact us via our website www.buscgroup.com.au and we can give you a call.