

# CORPORATE SUPERANNUATION FUNDS

Planning Partners provides a specialised service to Employers and Chief Financial Officers responsible for the employee Corporate Superannuation Fund. This service covers advice in the following areas:

## **COMPREHENSIVE SUPERANNUATION ADVICE FOR EMPLOYERS:**

We can review your existing corporate superannuation arrangements and benchmark against leading Funds. We also provide advice with regard to changes in taxation and superannuation legislation, including your obligations under Superannuation Choice.

## **ADVICE ON SELECTION AND DESIGN OF CORPORATE SUPERANNUATION FUND:**

Where a new Superannuation Fund is required for your business, we can advise on the most appropriate design of investment and insurance options for your employees and executives

## **COMMUNICATION AND EDUCATION SERVICES FOR EMPLOYEES:**

We attend your workplace every six months to meet with employees. We also conduct seminars as required and give your employees full access to our Advisor and Support staff.

## **FINANCIAL ADVICE:**

If required, a program can be put in place for in-depth financial consultations with employees. This can be provided to a specific class of employees or on an individual basis eg. at retirement.

## **MORTGAGE ADVICE:**

Planning Partners provides employees who are members of Corporate Superannuation Funds with access to free home mortgage and investment advice through our strategic alliances with professional Mortgage Broker firms.



ABN 24 943 115 344

Level 1, 587 Canterbury Road  
Surrey Hills Victoria 3127  
T 03 9830 0366 F 03 9830 7028  
[www.planningpartners.com.au](http://www.planningpartners.com.au)  
[advice@planningpartners.com.au](mailto:advice@planningpartners.com.au)

The information on this website does not take into account the objectives, financial situation or needs of any particular person. Before making an investment decision you should consult with your financial advisor and consider whether it is appropriate in light of your particular objectives, financial situation and needs.

Planning Partners Pty Ltd. Australian Financial Services Licence No. 222835 ABN: 24 943 115 344