

SELF-MANAGED SUPERANNUATION FUND INVESTORS

Planning Partners provides a specialised service to Self-Managed Superannuation Fund Investors. This service covers advice in the following areas:

SUERANNUATION CONTRIBUTION STRATEGIES:

Decisions regarding superannuation contribution strategies are critical in the months and years leading up to retirement. Recent changes to superannuation have increased the attractiveness of transferring external assets to the superannuation environment. Our strategies are based on an up-to-date understanding of legislation and are regularly reviewed for your circumstances.

LUMP SUM WITHDRAWAL AND INCOME STREAM STRATEGIES:

The recent Budget announcements have made Income Stream strategies more popular for Self-Managed Superannuation Funds. We work in conjunction with your Accountant to design, set-up and implement an appropriate withdrawal and pension strategy from your Superannuation Fund.

INVESTMENT STRATEGIES:

We review and re-draft the Investment Strategy for your Self-Managed Superannuation Fund and provide you with proactive asset allocation and investment advice to meet the needs of the members of your Fund. This may include our Portfolio Management service or a second-opinion service for Self-Directed Investors.

SUERANNUATION ESTATE PLANNING:

Assets held in your Self-Managed Superannuation Fund do not automatically form part of your Estate upon death. Our advice ensures that your interests in your Superannuation Fund will pass to your nominated beneficiaries in a tax-effective manner.



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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.

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