

Superannuation Advisory

Introduction

Our clients are successful business owners. Because they are successful in business, they will usually choose to manage their own superannuation, seeing investment management as another business. Operating a self-managed superannuation fund (SMSF) is no easy task and requires a high level of compliance advice. Fund members also need to be across the strategies that can be employed to maximise returns and minimise taxes.

Our qualified team is able to help SMSF owners navigate the compliance maze and is properly licensed to advise and support them in designing and implementing effective strategies.

Capabilities

Our Superannuation Advisory capabilities are as follows. Refer to our Capability Statements to see how we execute to meet your business needs.

- SMSF Compliance
- Superannuation Planning

Benefits

The benefits to you are:

1. As a successful business owner, you prefer to have control. Our SMSF compliance services can take care of the compliance risks so that you can focus on the fund's operations and performance.
2. SMSF compliance requirements make up a long list and failure to comply can mean significant penalties. Working with us means you can avoid the big penalties, maximise tax deductions and keep your superannuation where it belongs – in your fund.
3. If your business success translates to your SMSF, then you have another successful operating entity. As funds accumulate, you need to put in place the right strategies to maximise returns and minimise the impact of income tax on your retirement planning and our team has the experience you need. Because we understand superannuation, our specialists can help you put the right plan in place for your future.

What's next

Contact UHY to discuss how we can best assist you.
Connect with us and connect to possibility.