

(Download free pdf) The Seven Key Aspects of SMSFs

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Matthew Burgess

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#13159043 in Books 2015-01-27 Original language: English PDF # 1 9.00 x .58 x 6.001, .75 #File Name: 1925181499254 pages | File size: 69.Mb

Matthew Burgess : The Seven Key Aspects of SMSFs before purchasing it in order to gauge whether or not it would be worth my time, and all praised The Seven Key Aspects of SMSFs:

In recent years, the need for effective structuring of retirement savings has been brought into sharp focus for private investors and business owners alike. The combination of fundamental changes to the taxation regime, the vast amounts

of wealth accumulated within superannuation funds, for many the perceived lack of value delivered by industry funds and the increasing tendency for both business and personal relationships to be relatively short term (as opposed to lifelong) have meant that traditional approaches to superannuation have been revolutionised. In this context, the use of SMSFs has become ubiquitous. The range of fundamental issues that need to be considered in relation to establishing and successfully maintaining an SMSF is vast. This book analyses the key aspects of SMSFs, in the following order: a. glossary of abbreviations; b. explanation of the structure of trusts generally, with particular reference to SMSFs; c. overview of the fundamental aspects of SMSFs, using an example product disclosure statement as the basis; d. analysis of the main SMSF investment structures, including use of borrowing; e. SMSFs, estate planning and asset protection; f. death benefit nominations; g. example SMSF trust deed, including comprehensive user notes; h. template SMSF investment strategy; and i. pro-forma SMSF nominations (both binding and non-binding).