



SMSF

McCORMACK REYNOLDS SELF MANAGED SUPER FUNDS

Our Services

We are an accounting, taxation, business advisory and financial services firm.

We develop and implement growth strategies for our clients by adopting a holistic view of their business and by bringing together our expertise and timely advice in the complex fields of:

- Accounting
- Taxation
- Business Advisory
- Wealth Management
- Finance
- Self Managed Super Funds

We also offer complete business solutions in other areas such as audit, by linking closely with independent industry experts who we know and trust.

SELF MANAGED SUPER FUNDS (SMSFs)
ARE THE LARGEST AND FASTEST GROWING
SEGMENT OF THE SUPERANNUATION INDUSTRY.
WHETHER YOU ARE THINKING OF SETTING UP
YOUR OWN SMSF OR YOU ALREADY HAVE AN
EXISTING SMSF, WE CAN ASSIST YOU.

Our experts will assist you throughout the entire process of establishing, administering, managing, ongoing compliance and strategic advice for your SMSF.

Expert assistance is essential to ensure that this is an efficient process and has a successful outcome.

The McCormack Reynolds Self Managed Super Fund team provide accounting, taxation and audit services to over 300 SMSFs.

The team comprises a select network of professionals to advise you on all aspects of establishing and controlling your own SMSF.

Ben Reynolds, who leads the SMSF team, is a member of the Self Managed Super Fund Professionals' Association of Australia (SPAA) and is an Accredited SMSF SPECIALIST ADVISOR™.

Our experienced and skilled professionals give honest, excellent and relevant advice in a straight forward manner. We deliver significant benefits to our clients.

Is a Self Managed Super Fund suitable for you?

If you are considering setting up your own SMSF there are many demands made upon you which you need to consider in evaluating the benefits of a SMSF.

McCORMACK REYNOLDS SELF MANAGED SUPER FUNDS



McCormack Reynolds can assist you when deciding if a SMSF is suitable for your situation. There are five key issues to consider:

1. Consider your options and seek professional advice from your accountant or financial adviser.
2. Make sure you have enough assets, time and skills to devote to managing your own super fund and whether it's worth your while.
3. Understand the risks and laws.
4. Make sure your trust deed and investment strategy is tailored to suit the members.
5. Make sure you can meet your record keeping and reporting obligations.

The McCormack Reynolds SMSF team ensures that your fund is administered professionally and efficiently for the establishment, accounting and compliance administration of superannuation funds. This allows trustees and members to focus on the implementation of their investment strategy.

The McCormack Reynolds SMSF team offers the following services:

1. Establishment of a new fund
2. Ongoing administration, management and compliance
3. Tax effective contribution and income stream strategies
4. Limited recourse borrowings arrangements and other strategy developments
5. Audits.

McCormack Reynolds Wealth Management, a separate division of the firm, has a licensed financial adviser who is able to consider your personal situation and recommend suitable strategies and investments to enable you to achieve your financial goals.

This service complements those services offered by the McCormack Reynolds Self Managed Super Fund team.

The McCormack Reynolds Wealth Management division offers the following services:

- Wealth accumulation
- Personal risk insurances
- Superannuation and Retirement planning
- SMSF advice and strategies
- Estate planning
- Investing
- Pension / Income stream strategies and advice
- Aged care planning.

At McCormack Reynolds you will always be welcomed by people who use everyday language, provide excellent advice and value relationships. We understand your need for doing business with people you trust.

We feel the same.

Our relationship and commitment to you

Our relationship with our clients is based on how we interact with them in the following ways:

1. **Accessibility** – clients can easily contact, speak or meet with us
2. **Responsiveness** – clients see that we are action based problem solvers
3. **Accountability** – our responsibilities as our clients' SMSF advisor are taken very seriously
4. **Understanding** – we understand our clients' wants and needs
5. **Pro-activity** – we proactively go to our clients with ideas and suggestions.

By being confident in our approach and the services we offer, we are able to make a clearly defined commitment to our clients. A commitment that is at the heart of what we do and who we are.

We will always:

- provide an efficient, effective and proactive service
- be confident that our advice is excellent, relevant and timely
- communicate clearly using straightforward language
- offer a transparent, value oriented fee structure.

If you have any questions please do not hesitate to contact Ben Reynolds on 8161 1000.