

SuperConcepts Foundation

New full-service administration for clients with simpler asset structures

LIMITED OFFER

Save up to \$1,800 off
FY21 fees *

At a glance



Service: Comprehensive low-cost SMSF admin



Ideal for: Advisers



Cost: From \$1,500 (GST inc) **

Our brand new **Foundation** service is a low-cost administration solution for your clients with simpler asset structures. That is, it's for clients who intend to invest in cash, term deposits, listed Australian equities or have their assets held in a platform.

Foundation's comprehensive service means advisers continue to receive high quality support covering year-round fund administration, compliance monitoring and regular fund reconciliation but at a lower cost.

SMSFs made easy

The premise behind all SuperConcepts services is to make SMSF administration easy for professionals. And Foundation is no different. By taking care of your paperwork, we leave you to focus on providing the best service to your clients. Foundation uses smart technology, automation and 30 years of industry experience to ensure your client's SMSF is in the best hands possible.

Key features



24/7 online access to your client's SMSF through easy to use dashboard



Ongoing administration including timely reconciliation of client funds



Dedicated client services manager to assist with your queries



Annual accounts and tax including preparation of annual financial statements and SMSF annual tax returns

FEATURES	Foundation
24/7 access via online dashboard	✓
Fund compliance activities i.e. transfer balance account reporting, lodgement of tax return	✓
Access to education seminars and technical services	✓
Mail house and document storage	✓
Allowable assets	Restricted
Administration of property assets	\$300 per property
Administration of pension accounts ¹	✓
Administration of Limited Recourse Borrowing Arrangements (LRBA)	\$110 per LRBA
Facilitation of payment	NA
Audit services	\$495
Corporate trustee and company maintenance	\$110
Provision of activity statements (BAS or IAS services)	\$200
Actuarial certification (account-based/defined benefit)	\$225/\$580

¹ Two-tier pricing - refer to the Administration Service Guide (ASG)

* Terms and conditions

1. Transfer your funds to our administration service before 30 June 2021 and we will waive the monthly catch up processing fee between 1 July 2020 and the time we receive the fund transfer application. Monthly fee is equivalent to 1/12 base administration fee. **2.** The offer is not applicable to funds which are currently administered by the SuperConcepts group. **3.** Application must quote promotional code SCSMSFA-\$0TRANSFER. **4.** Any outstanding prior year lodgement and other ancillary fees will be charged the relevant fees as stated within our Administration Service Guide. **5.** Fund documentation necessary for fund transfer must be provided within 3 months of application to be eligible for this offer. **6.** This offer is not available in conjunction with any other offers.

** All details about our fees and charges are outlined in the Administration Service Guide (ASG)

We're here to help



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Important information

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