

# SMSF ADMINISTRATION SERVICES

A solution for accountants  
and financial advisers



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## QUALITY SOLUTION FOR ACCOUNTANTS AND ADVISERS

With one-third of all Australian superannuation being represented by SMSFs, accountants and financial advisers are facing the challenge of providing competitive SMSF support to their clients.

How do I retain client relationships when keeping up with certification training, compliance and ever-changing government regulations may not be cost-effective for my firm?

How do I engage third-party SMSF services whilst ensuring my clients continue to receive personalised, quality support?

Practical Systems Super combines technical expertise with firsthand experience of regional Australia to create a platform that makes the management of SMSFs easier for financial professionals and their clients.



## ALL-IN-ONE

Practical Systems Super is your all-in-one SMSF solution. Our unique, streamline approach offers convenience, efficiency and continuity. Everything you need is just a phone call away.

We provide the SMSF software, administrative support and financial services. Our expert support and licensed SMSF advice is personalised to you and your client's needs, enabling you to work with trustees throughout a fund's lifecycle.

Our SMSF specialists can provide independent advice to help your clients make the right decisions for their retirement, including; new fund establishment, contribution strategies, pension commencement and class of product advice on deposits, securities and insurance.

We take care of the accreditation, paperwork, compliance and audit obligations, so you can concentrate on taking care of your client.



## PEACE OF MIND

Practical Systems Super gives you the security of knowing that you are taking care of your clients and their future. With our tailored approach, you can choose to retain all client-facing interactions, or you can put your clients directly in touch with our team.



## THE PERFECT FIT

Practical Systems Super has a simplified fee structure, charged at a set rate regardless of fund structure or size. This way, you always know how much SMSF management will cost, allowing you to be flexible with the level of service and support you provide your clients directly. And with no minimum fund restrictions, you can be rest assured that Practical Systems Super is the perfect fit for you.

### Annual Compliance Plan

- Easy-to-use software with trustee and adviser logins as required, including ongoing maintenance, enhancements, and support
- Compilation of annual fund accounting records
- Maintenance of investment register and capital gains tax records
- Procurement of an actuarial certificate for the fund where required
- Preparation of annual financial statements
- Preparation of annual member statements
- Preparation of trustee minutes of resolutions

### Full Service Plan

Includes all of the items in the annual compliance plan, plus:

- Periodic entry and reconciliation of bank and investment transactions
- Provision of fund mailbox for correspondence, investment notices, etc (if required)
- Automated data feeds
- Real-time compliance monitoring of contribution caps, pension withdrawals, bank balances and investment policy ranges
- Annual benchmark reporting



Independently owned and operated in Australia, providing a personal approach from experienced professionals.



**Reduce the costs of SMSF administration while retaining your client relationships.**

**For your complete SMSF solution, visit us at [pssuper.com.au](https://pssuper.com.au)**