




**YOUR SMSF  
RETIREMENT-READY**

*with*

**JEWELLMOORE**

CHARTERED ACCOUNTANTS

# An *Intuitive* & *Integrated* SMSF Solution



Jewell Moore has an integrated SMSF solution that helps you manage your SMSF all in one place. Powered by smart technology and superannuation expertise, it's the easy way for you to set up an SMSF, transact, invest your super and help you look after all the administration and compliance that comes with managing your own SMSF.

## **DESIGN YOUR OWN SMSF SOLUTION**

Your SMSF is as unique as you are. Jewell Moore assists you with designing your own SMSF solution, and provides the tools and professional compliance services to support you.

## **YOUR CHOICE OF FINANCIAL ADVICE**

Jewell Moore does not provide financial advice.

As your accountants we take our independence seriously and therefore do not believe in taking commissions or any other form of payment

which may bring our independence into question.

The Jewell Moore SMSF Establishment Service is an intuitive and simple way to get you started with your SMSF, including the preparation and registration of all required documents to set up your SMSF.

When establishing an SMSF you will need to provide us with a Statement of Advice [SOA] from your financial advisor recommending the establishment of a SMSF for you.

If you do not have a financial advisor we can arrange for a suitably registered financial advisor to work with you to prepare the SOA.

You may use your own financial advisor or we will be happy to refer you to one of the financial advisors that we currently work with. In all cases we will work with which financial advisor is assisting you to ensure that the administration of your fund is fully compliant.

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## **JEWELL MOORE SMSF ESTABLISHMENT SERVICE**

Setting up your SMSF is easy. Once you have determined that a SMSF is the right option for you our team will take care of all the details in establishing your SMSF. This includes the statutory documents for the establishment of your fund as well as relevant tax registrations.

Current legislation requires that you seek appropriate advice about establishing your fund. We therefore require a copy of the Statement of Advice [SOA] confirming that this structure is appropriate for your circumstances. You can obtain a SOA from your financial planner or we can arrange for a licensed financial planner to attend to the SOA on your behalf.

## **JEWELL MOORE SMSF ADMINISTRATION SERVICE**

Less paperwork, more peace of mind

Jewell Moore's administration service helps you keep your SMSF on track and compliant with the relevant laws and regulations. We'll help look after the paperwork, so you have more time to focus on the SMSF strategies and investments that are important to you.

You can learn more about the Jewell Moore SMSF Administration Service in this Guide.

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## HELP TO STAY COMPLIANT

Superannuation laws and regulations can be complex. We'll help you manage the paperwork, reporting and compliance that comes with having your own super fund.

We will also monitor compliance of member contribution caps and pension obligations, maintain member records and provide annual member statements.



## EXPAND YOUR VIEW

Get the full picture of your SMSF's investments and additional SMSF information, all in one place. We use industry leading software to maintain your fund and you will have full access to this information whenever you need it. You will also be able to access additional

SMSF information (such as member balances, contributions caps and pension limits) online.

All your documents in one secure place Your SMSF's online document library helps you store, share and access important documents.

Save time on the day to day management of your fund

We will also arrange the review, signoff and lodgement of the SMSF's annual tax return and financial reports.



## SMARTER COLLABORATION

Jewell Moore works actively with financial planners, solicitors and auditors to ensure that you get the best possible service for your SMSF.

This is important as it ties together your retirement planning and estate planning together with the annual compliance and administration.

By collaborating we find that you get the best possible alignment of your goals.



## EXPERT HELP WHEN YOU NEED IT

At times, running your own super fund can be complex. So it's good to know you have the back up of our SMSF team to help you keep your SMSF compliant.

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