

# Referring SMSF Advice

Where SMSF advice is considered financial product advice, SMSF Works has developed a referral process to help you meet your clients' needs.



## Referral Deed

Referrer to sign a Referral Deed with SMSF Works and provide a letter of introduction to the client being referred. This Deed is intended for a Non-AFS Licensed Referrer and no remuneration/commission payable.

### Fee

nil



## Training

SMSF Works to provide training to the Referrer on the process including where the line is for providing advice and how to conduct a client meeting within the guidelines.

### Fee

No charge



## Fact Sheets

Our referring partners can access our Fact Sheets, each being a comprehensive one-pager on SMSF Advice topics. These can be used in discussions and distributed to your clients.

### Fee

No charge



## Client meeting

A meeting is required to complete the Fact Find of client's details, objectives, member's superannuation interests and tax position. This may require historic financial information. This can be undertaken by the Referrer or SMSF Works.

### Fee

\$275 ph



## Advice

SMSF Works undertakes the assessment, determines the appropriate options and proposes a recommendation in the form of a Statement of Advice (SOA).

### Fee

Is a SMSF right for you?	\$990
What contribution is right?	\$550
Is a LRBA right for you?	\$1,100
Is a pension right for you?	\$550

**IMPORTANT INFORMATION:** SMSF Works has taken reasonable care to ensure that the information found in this fact sheet is correct at the time of writing. The information contained in this fact sheet is a guide only. You should obtain further information specific to your situation or professional advice before making a decision. Changes in the law or ASIC's policies may occur at any time and may impact the accuracy, reliability or completeness of the information. We are not liable for any decision taken on the basis of the information shown in or omitted from this document. Copyright © SMSF Works. All rights reserved. Version 2 – November 2016

# Referring SMSF Advice



## Documentation

SMSF Works undertakes the preparation of all relevant SMSF documentation; establishment, pensions, LRBA's and maintenance.

## Fee

Refer SMSF Works Documentation Services Guide



## Delivery

SMSF Works prepares all SOA's and documents for delivery via email (pdf) or post (bound). These can be delivered to the Referrer or the client directly.

## Fee

Refer SMSF Works Documentation Services Guide



## Client meeting

A meeting may be required to present the SOA and sign the documentation. This can be undertaken by the Referrer or SMSF Works.

## Fee

\$275 ph



## SMSF Administration – Accounting and Tax

Clients existing service provider or SMSF Works to attend to the necessary administration based on the SOA and the executed documentation.

## Fee

Refer Service Provider

Other Factsheets on various SMSF topics are available on our website at [www.smsfworks.com.au](http://www.smsfworks.com.au)

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