



# Superannuation consulting? Our backyard.

The opportunity presented by self managed super funds to encompass a greater level of freedom to control the direction, investment profile, fund services and overall financial flexibility is attractive to many of Vincents' clients.

As Australia's superannuation marketplace matures, so too does the level of complexity placed upon it by evolving government regulation. In turn, the level of sophistication required by individuals opting to administer a self managed super fund is ever-increasing.

Vincents' Superannuation Consulting group has the skills and experience necessary to support clients with their personal superannuation funds in each of the accumulation, retirement and estate planning phases. Our experts have extensive experience in all areas of superannuation, working with trustees, employers and members.

Vincents' dedicated team can provide direct access to high quality practical advice in all relevant areas including Superannuation Industry (Supervision) Act & regulations (SIS) compliance, administration, accounting of funds, taxation of funds and taxation of benefits. We also have a depth of expertise in dealing with all aspects of your retirement and estate planning needs, addressing your personal, family and estate planning wishes. Our expertise enables us to help you achieve your goals while ensuring the best after tax outcome available.

## Our skills & services

### Self-managed funds

- Establishment of self-managed funds
- Structuring self-managed funds advice
- SIS compliance requirements

### Investment & strategy advice

- Pre-retirement strategies
- Pension strategies
- Asset allocation advice
- Fund manager assessment

### Consultation services


- Valuation of superannuation benefits upon matrimonial separation
- Advice on proposed investment transactions to ensure compliance with SIS

### Business growth

- Structuring advice
- Preparation of annual financial statements
- Preparation of annual return to be lodged with the ATO
- Maintaining accounting records
- Maintaining tax history of investment
- Managing quarterly taxation obligations

### Retirement & estate planning

- Tax effective strategies to create wealth via superannuation
- Taxation of pension and lump sum benefits
- Taxation of funds, before and after retirement
- Different styles of pensions
- Incorporating superannuation into estate plans

 Vincents provides expert services in the specialties of taxation & business solutions, financial advisory, corporate advisory, insolvency & reconstruction, forensic accounting, forensic technology and executive search & selection.

Visit [www.vincents.com.au](http://www.vincents.com.au) for more information on Vincents' expert services.

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