

3 EASY STEPS TO DIY YOUR SUPER FUND

1

EVALUATE THE SELF-MANAGED SUPER OPTION

Understand Trustee obligations.

Understand the time, effort and skill involved.

Consider appropriateness for your circumstances.

Weigh up against other superannuation options.

2

ESTABLISH THE FUND

Identify who will be members.

Prepare the Trust Deed

- Accumulation
- Pension phase

Establish administration arrangements.

Develop a written investment strategy.

3

RUNNING THE FUND

Act in accordance with the Trust Deed.

Arrange the audit of the fund & comply with legislation.

Keep comprehensive records.

Adhere to the investment strategy.

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