















Simple SMSF checklist

Use this checklist as a guide to provide your documents to your SMSF Specialist in preparation for your SMSF annual tax compliance package

-  bank statements
-  term deposit statements
-  dividend statements, contract buy & sell notes
-  managed funds & wrap account, statements & annual tax statements
-  private companies & unit trusts, financials & tax returns
-  property purchase or sale, contract of sale documents
-  purchase or sale of other assets, contract of sale documents
-  loan statements
-  limited recourse borrowing arrangement, deeds & agreement
-  contribution & rollover documents
-  rental property statements, lease agreements, valuation reports
-  pension & lump sum payment documents
-  life insurance premium notice
-  administration expense receipts

© 2016 Concise Super