

Are you tired of chasing SMSF clients WHO

Don't take up
your advice

Engage with
someone else

Think they can do
it all themselves

3 PROBLEMS FINANCIAL PLANNERS HAVE WHEN HELPING THEIR CLIENTS WITH SELF MANAGED SUPER FUNDS

1

Frustrated when **UNDER RESOURCED**

You get caught up in too much administration paper work and miss out on face to face time with clients

2

Feel **UNDER VALUED**

When you put in a lot of effort for little reward, wasting your time

3

Encounter public **NEGATIVE** perception

Leading you to constantly justify your credibility to prospects and clients



CONCISE SUPER

has designed a framework exclusively for financial planners that will help you retain and enhance your SMSF clients relationship

Concise Super's "EASY as" framework

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as

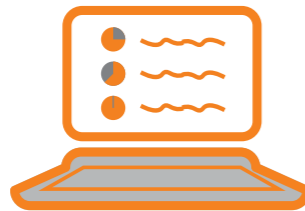
Establishment
of SMSF

Administration
& Bookkeeping

Systems

Year end SMSF
Tax Compliance

Active
Support



"We are constantly astounded by the great help from Concise Super and their willingness to go the extra mile. Given the complications that can come with SMSF administration we are so glad to know we have them on our side. I can't recommend them highly enough."

~ Paul Graham, Financial Planner at Link Wealth Group

BENEFITS OF THE FRAMEWORK

INCREASED RESOURCES

Imagine providing SMSF advice to your clients and having the administration, accounting and tax specialists support to implement it

PRODUCTIVE RESULTS

Imagine frequent face to face time with your SMSF clients with real time SMSF financial information and get recognised for it

ACKNOWLEDGED EXPERTISE

Imagine your clients finally see you for the professional, trusted advisor you always have been

Choose an SMSF service suitable for each of your clients:

MOMENTUM

Perfect for the interactive client

- SMSF annual tax compliance document package including superannuation fund annual return, financial statements, member's statements & minutes
- Lodgement of annual return
- Manage audit process
- SMSF checklist
- Access to SMSF Specialist via phone &/or email
- Bank, Broker and Wrap data feed service*
- Login access to client's Fund dashboard
- Reconciliation of Fund transactions monthly
- Access to real time financial data, anywhere, any time, on any device
- Reports available for Fund review
- Monitor minimum & maximum pension payments
- Monitor contributions against caps
- Monitor investment strategy of Fund

MONTHLY SERVICE

REVIEW

Designed to incorporate a snap shot of SMSF position for regular client consultations

- SMSF annual tax compliance document package including superannuation fund annual return, financial statements, member's statements & minutes
- Lodgement of annual return
- Manage audit process
- SMSF checklist
- Access to SMSF Specialist via phone &/or email
- Bank, Broker and Wrap data feed service*
- Login access to client's Fund dashboard
- Reconciliation of Fund transactions in preparation of your client ongoing review meeting**

BI-ANNUAL SERVICE

most popular package

TRADITIONAL

Ideal for clients you consult with once a year

- SMSF annual tax compliance document package including superannuation fund annual return, financial statements, member's statements & minutes
- Lodgement of annual return
- Manage audit process
- SMSF checklist
- Access to SMSF Specialist via phone &/or email
- Bank, Broker and Wrap data feed service*

ANNUAL SERVICE

*where supported
**up to 2 meetings per year

Ensure you retain your clients relationship after the first consultation

- Minimise your time chasing unresponsive prospects
- Implement new services and generate ongoing income
- Retain and service your clients beyond their expectations
- Build a strong, long lasting relationship with your clients

To get started

Call to book your complimentary "What's in it for me" session
(and yes, there is a lot in it for you)

What's in it for me session includes:
~ Q & A about your business
~ Overview of Concise Super's "EASY as" framework that will consolidate your SMSF services
~ Determine the SMSF service package options to suit your clients
~ Discuss the simple steps to get started

Call to **BOOK** your complimentary 1 hour session today on **(03) 9838 3055**

No minimum number of funds required to get started!

"We know first-hand of the frustrations you face when not recognised for all the hard work you put in and the expertise you have to offer"

*~ Fabio & Kerrie
Concise Super*

CONCISE SUPER

Is a boutique Accounting Firm specialising in Self Managed Superannuation Fund Administration, Compliance and Advice for Financial Planners and Accountants. This is all we do!

Our team has been in the industry for over 20 years with experience in Tax and Superannuation working with Corporate Fund Administrators, in Public Practice, with Business Owners, Accountants and Financial Planners.

