

SMSF Connect

Education Resource

Enhance your website with independent information for SMSF trustees

The SMSF Association is always looking for ways to support and add value to our Specialist members. We are conscious that educating your SMSF clients, particularly through periods of change, is a continued commitment of your time and resources.

We are pleased to launch our new **SMSF Connect Education Resource**, enabling you to offer SMSF education resources to your valued clients (via a co-branded portal).



ASIC Report 575 emphasises the importance of consumers making informed decisions regarding SMSFs. Further, it encourages practitioners providing advice on SMSFs to take the necessary steps to provide information on the duties and obligations of an SMSF trustee.

This education portal will:

- Provide you and your clients with a wealth of quality information and education resources (via SMSF Connect, the SMSF Association's regularly updated trustee platform), providing you with a simple solution to help meet recent ASIC 575 guidelines (requiring provision of SMSF education for trustees) and ATO compliance requirements.
- Add value to your website and client services.
- Direct your clients to a co-branded resource showcasing your brand alongside that of the SMSF Association, the peak professional body representing the SMSF sector.

"A current resource of factual information for trustees to access, which allows my clients and I to make more informed decisions."

- Chris Launer, SMSF Specialist Advisor (SSA), Partner, Pinnacle Wealth Management

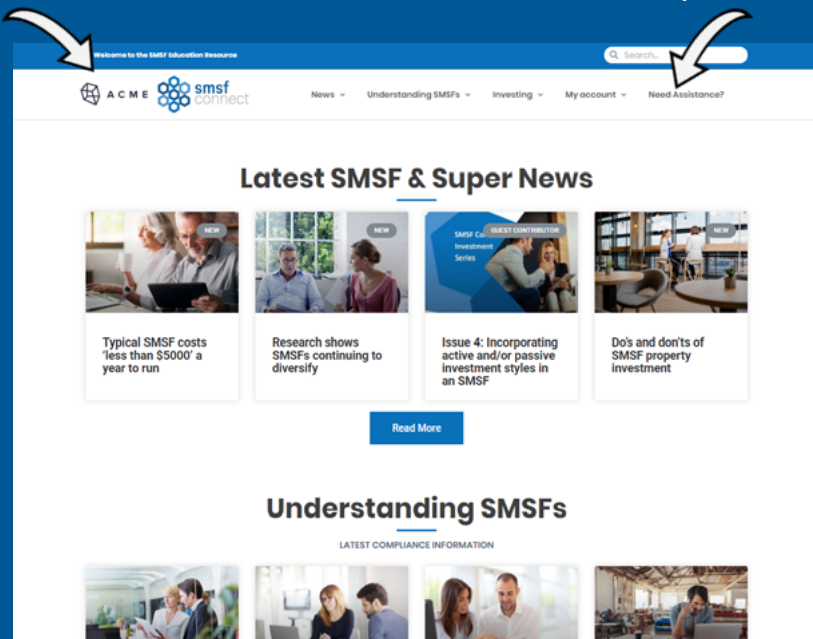


What's included?

Information and resources available via a secure, co-branded portal requiring clients to register for access. Required registration will provide security and ability for you to provide this resource to clients of your choosing.	✓	Investment information on diversification, portfolio construction, markets, industries and trends, and key asset classes.	✓
Regularly updated compliance resources categorised into: thinking about starting an SMSF, setting up an SMSF, contributions and rollovers, investment education, paying benefits, administering and reporting and estate planning.	✓	Opportunities for your clients to seek your guidance on the information contained throughout the portal through the 'Need Assistance?' button in main navigation.	✓
Latest news updates on topical SMSF issues including legislation changes and annual Federal Budget information.	✓	Monthly e-newsletter containing latest news articles and key resources to drive your clients back to your co-branded portal.	✓

Your logo will be positioned here

'Need Assistance?' links to your 'Contact Us' page provided upon registration to direct clients back to your advice services.



Cost

One-time set up fee of \$300 (+GST), and an ongoing monthly fee of \$100 (+GST) per month via direct debit arrangement.

How to register

If you are a company with at least 1 SMSF Association Specialist member, and interested in adding this resource to your website, please [click here](#) to fill out our online web form, or enter the following link in your web browser: <https://smsfconnect.com/firm-registration>

Terms and Conditions

To implement this portal you will be required to acknowledge a simple licensing agreement which covers the nature of the education materials and interaction with your website.

Contact

If you have any further questions please contact the SMSF Association Head Office on: 08 8205 1900 or via email at: memberservices@smsfassociation.com



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www.smsfconnect.com

