

The Transition Process



Welcome to Heffron!

1



Provide your details & sign
Provide your fund details and sign the service agreement to partner with us

2



Complete your documents
In order to optimise your SMSF and transition successfully

6



Log in to your portal
View details, documents, news, insights and start a conversation

8

You make the change

Fund Transition

You're done!



3

We prepare and issue
We will prepare your on-boarding documents



4

We will help you
We will provide tailored options to suit your needs



5

We engage your current administrator
We liaise with your administrator to extract the information we need



7

We review your fund
We will complete a comprehensive review and make any recommendations

