Heffron

Super Toolkit:

Investment Strategy

Get in touch today.

Call 1300 HEFFRON

Visit www.heffron.com.au

Email sales@heffron.com.au

Our newly created Heffron Super Toolkit will allow you to successfully navigate and optimise taxation and compliance for your SMSF clients

The first component of the Heffron Super Toolkit is the Investment Strategy

We know efficiency and minimising risk are important to how you run your business. The Heffron Investment Strategy tool is not just a template, the guided format helps you and your clients understand exactly what issues should be considered. We don't give investment advice, we help your clients tell their own story.

Heffron administers 4000 funds and our work in assisting other practitioners with their superannuation queries allows us to ensure the details covered in the investment strategy tool includes everything needed to pass audit each and every year.

Who is it for?

Accountants can start the document and 'hand it over' to their client to complete. That way they're not advising but giving the trustee the information they need to consider themselves.

Advisers can quickly and easily create documentation that clearly reflects the advice and discussions they've already had with the trustee. They won't miss any crucial details because relevant prompts appear during the process.

Auditors can be confident the fund's accountant and trustee have been prompted to clearly set out their thinking when it comes to investing rather than just ticking boxes on a template.

Benefits of the Investment Strategy

Peace of mind

Be confident that the articulation of your SMSF clients' strategy will pass audit and be accepted by the ATO. With Heffron Investment Strategy you can mitigate risks and be sure nothing will slip through the gaps.

Sharing with clients is easy

Once you have created a document specific to your client's particular situation you can share it. Accountants can create a draft strategy to share with their trustees or their adviser for completion, advisers can prepare the strategy and share it with trustees for confirmation and signing.

Valuable help for your staff

You can use the tool to educate staff on the considerations required when creating an audit and ATO compliant investment strategy.

Increase your productivity

The tool simplifies the delivery of an investment strategy helping you become more efficient in producing a document that is sufficiently rigorous to pass the heightened scrutiny from the ATO.

Enable client accountability

You can start entering details ready for your clients to enter their own allocations and the risks and other issues they considered in forming it. This helps them document all the requirements and be accountable for their own investment objectives and retirement goals.

Practical expertise

Our extensive technical knowledge and understanding of SMSFs has contributed to creating this valuable tool. We give you the correct terminology and language prompts to help you build the right document for your clients.

Deliver a high level of service

The Heffron Investment Strategy tool is not just a template – the guided format makes relevant recommendations and prompts you to rethink or make changes when required. You can use it to test or validate a strategy you have or are considering.

What's included?

Just $20 user/mth (+GST) gives you access to Heffron Super Toolkit.

Click here to subscribe

We are building a range of SMSF tools – wizards, calculators, forms and documents to support you and your clients through the SMSF journey.

Subscribe today to be the first to access each new component as they're released.