



**More than just a
service provider
we are your
partner in SMSFs**



What are the benefits of having an SMSF?

You may be looking to broaden your client base to include SMSFs or your existing clients may have a desire for more diversity and control of their investments as they approach retirement. If so, here are some of the many benefits of starting an SMSF:

Flexibility & control

Greater control over structuring investments to meet retirement objectives for a range of members.

Cost control

Fixed fee structures rather than variable percentage fees, which benefit those with large superannuation balances plus costs split amongst all members (up to 4).

Asset transfers

Certain assets can be transferred to an SMSF, boosting superannuation savings and preserving cash outside the SMSF.

Portability

You can change your supplier but keep the same fund as your lifetime retirement savings vehicle.

Tax benefits

Tax-effective decisions can be made by controlling how and when benefit payments are made as well as the timing for sale or purchase of fund assets.

Lease premises to a related party

SMSFs can buy business premises from a related party at market value and lease those premises back to a related business, aiding cash flow and protecting the property from creditors.

Intergenerational wealth transfer

Greater flexibility about how superannuation death benefits can be distributed.

All these benefits come with compliance and paperwork requirements which is where we come in. Keep reading to find out about how we started, what we do and why we do it.

Why should you partner with us?



Award Winning Experts

Our diverse team of highly respected industry experts combine their extensive technical and practical expertise to help you spot opportunities and avoid pitfalls.

When you entrust your SMSFs with Heffron you have peace of mind that you and your funds will be proactively maintained and looked after by the best in the industry.



Independently Owned

Heffron have been sharing their knowledge and expertise with SMSF trustees, advisers and accountants since 1998. Heffron is not owned by, licensed to or affiliated with any financial institution and has no vested interest in the product decisions our clients make. SMSFs have always been about choice and flexibility and our role is to help everyone enjoy that freedom.



Comprehensive Offer

We work across nearly all aspects of SMSF from education and training to support tools and compliance services. Working in each of these areas helps us strengthen our knowledge and practical capability as a whole, so that we're able to execute to the highest level of competency. It's applied to everything we do and is what sets us apart.

What do we offer?

"Self help with confidence."

Geoff Rooney
BDO
[Super Companion]

"The best source of SMSF technical information in the market."

Mark Lindsay

Our solutions are designed to fulfill your technical and practical SMSF needs.

Actuarial Certificates

Integration with BGL360 and Class ensures 100% accuracy with Heffron's Actuarial Certificates.

All your needs are met with flexible functionality, quick turnaround and technical support from our efficient, accurate and friendly service.

[Learn more here](#)

Document Services

We offer a comprehensive range of high-quality documents to establish and manage an SMSF.

Our suite of documentation gives you a clear, accurate and compliant record of the trustees' decisions across the lifecycle of the SMSF. We have now started to create these documents digitally, with our Super Toolkit.

[Find out more here](#)

Fund Administration

We deliver a comprehensive service that includes accurate and reliable compliance.

Our administration service gives you access to Heffron's market leading experts who provide strategic and proactive insights on how to optimise SMSFs for your clients.

By partnering with Heffron, you can proactively:

- Spot opportunities;
- Implement strategies across multiple funds;
- Raise potential compliance issues.

[Find out more here](#)

Super Toolkit

Our toolkit will contain everything you need to navigate and optimise SMSF compliance and tax for your clients.

As the future of Heffron's Document Services, we are excited to share not only our templates, but more importantly the tips and tricks that go with them.

The Super Toolkit now includes two subscription levels, Base and Professional, encompassing Investment Strategy, Investment Strategy Review, Pension Establishment Documentation, BGL integration and multi-user accounts.

The future of the Super Toolkit includes wizards, calculators, forms and other guided documents to support you and your clients through their SMSF journey.

[Find out more here](#)

Super Companion

Our quick reference tool is written by industry experts who have day-to-day experience in every facet of superannuation and SMSFs.

Heffron's Super Companion is an online technical resource focussing on SMSFs and broader superannuation issues.

Unlike a static 'textbook' that you might purchase once or even every year, the Heffron Super Companion is reviewed regularly and updated to reflect any COVID-19 updates, legislation changes, case law, regulator views etc. When we have a new insight or strategy you get it too!

[Find out more here](#)

Technical & Education

Our knowledge is shared through a suite of technical and education services which can be delivered in-person, online, through a subscription or as a one-off purchase. Our team of SMSF specialists are the trusted voice in the industry giving you support as and when you need it.

The education team present a range of virtual and live events throughout the year, catering to clients located all over Australia. We are proud to be a chosen SMSF Association Accredited Educator and can offer in-house training, with ongoing or ad-hoc solutions for you and your staff.

[Learn more here](#)

All new Education Bites!

An on-demand learning platform that gives you small 'bite sized' courses on a particular area within a superannuation topic, allowing you to learn at your own pace, and in your own time.

Each bite is a small CPD module focussing on a particular superannuation concept or topic designed to keep you engaged with a combination of reading, videos, knowledge checks and assessment. Education Bites is written by our team of technical experts and uses real life client scenarios, giving you practical skills to apply the learnings in your own practice.

[Find out more here](#)

How do we deliver an efficient service?

*"Great responsiveness.
Easy to deal with
via client portal."*
Steve Nielsen

The service we provide is through real relationships with a dedicated specialist or support team who will help with complex problem solving, technical advice, support on implementation or simply a second opinion.

To ensure we continue to deliver a premium service we are always developing new or better systems and processes to meet your needs including:

Heffron Administration Portal, Maestro

Through our safe and secure portal, our administration clients can easily communicate with us, share and store files and access fund information. Some of the features include the ability to:

- Review all SMSF data and documents;
- Review and track year end lodgement status;
- Initiate transitions of SMSFs;
- Track pensions paid towards required minimum and maximums; and much more.

*"Heffron makes life
easy and is really good
value. We will always
rely on Heffron."*

Hayley Pilkington
SINCLAIR WILSON

Electronic Signatures

Signing documents through our electronic platform means you and your clients receive documents faster and with greater ease. Tax returns are lodged sooner, document processing times are faster. And clients have greater flexibility with where in the world they sign. With our added security measure of access codes on top of an already safe and secure platform, your clients can rest easy their documents are protected.

Data Feeds

We pull electronic data securely from your clients' financial institutions, meaning everything is in one place. We keep funds up to date – saving time when information is provided.

Direct Debit

We facilitate direct debit from your clients' nominated cash account allowing ease of payment.

Dedicated Team

We allocate a specialist team of accountants to each client, providing a streamlined and consistent service.

**As your partner, we provide you with
tailored options to suit your technical and
practical SMSF needs.**

**We take care of the SMSF compliance and
deliver expert technical support, so you can
focus on what you do best, achieving the
best results for your clients.**



**For more on how
you can partner with us
get in touch today.**

Call 1300 HEFFRON

8.30am – 5.30pm

Monday to Friday

Visit www.heffron.com.au

Email sales@heffron.com.au

NSW HEAD OFFICE

Unit 1, 27 Bulwer Street

Maitland NSW 2320

QLD

Level 15, 120 Edward Street

Brisbane QLD 4000

POSTAL

PO Box 200

Maitland NSW 2320