Super Toolkit

To help you unravel the complexity of SMSF compliance and tax

Get in touch today.

Call 1300 HEFFRON

Visit www.heffron.com.au

Email sales@heffron.com.au

Our newly created Heffron Super Toolkit gives you everything you need to reduce risk and deliver compliance for your SMSF clients.

The first four components are available now with more on their way.

We know maximising efficiency and minimising risk are important to how you run your business. As the future of Heffron's Document Services, we are excited to share not only our documentation templates, but more importantly the technical guidance to ensure nothing is missed, everything is covered and ATO compliant.

The current components in the Super Toolkit are the Investment Strategy, COVID-19 Rent Relief, Investment Strategy Review and the new Pension Pack which includes pension establishment documentation. New items on their way include wizards, calculators, forms and other guided documents to support you and your clients through their unique SMSF journey.

Who is it for?

Accountants can do as little or as much of the form completion as makes sense, handing over to the client or an adviser where appropriate. Our unique collaboration feature ensures that the right people are doing the right work at the right time.

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

Auditors can be confident that the fund's accountant, trustee and adviser have received expert digital guidance along the way. In cases where it's important that trustees explain their thinking (for example, when it comes to investment strategies), the Toolkit guides them to do so.

Benefits of the Heffron Super Toolkit

Peace of mind

Be confident that the articulation of your SMSF clients' documentation will pass audit and be accepted by the ATO. Our first release tools will help you mitigate risks and be sure nothing can slip through the gaps.

Sharing with clients is easy

Intermediaries can create a document draft specific to a client's particular situation, they can then share it with colleagues or the client for more information, confirmation and signing.

Valuable help for your staff

You can use the toolkit to educate staff members on the considerations required when creating compliance documentation.

Increase your productivity

The tool simplifies the delivery of information and helps you become more efficient in producing a document that is sufficiently rigorous to pass the heightened scrutiny from the ATO.

Enable client accountability

Sometimes we need to record a client's own decision making. The tools where this makes sense are designed with trustees in mind – they can complete the details themselves.

Practical expertise

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

Deliver a high level of service

The Heffron Super Toolkit is a new way to deliver administration and compliance for your clients. The guided format of each new component makes relevant recommendations and prompts you to rethink or make changes when required.

What's included?

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

Click here to subscribe

Follow the link below to learn more about the Super Toolkit. Be sure to scroll down on the page to register for a live demonstration with one of our sales team.

Register for a demo

Get in touch today.

Call 1300 HEFFRON

Visit www.heffron.com.au

Email sales@heffron.com.au