



**We help make SMSFs more
rewarding for Professionals
and Trustees**



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.

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.

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.

These trustee benefits come with compliance and paperwork requirements, which is where we come in.

Why should you partner with us?

Our technical experts are at the forefront of legislation helping you unravel the complexity of superannuation and SMSFs.

We understand every practice is different which is why we offer services that support you in the way that best fits your business.



We teach you

Our on demand education platform and scheduled program of events help you to increase specialist skill and fill knowledge gaps within your entire organisation.

We support you

The tools we have created and the document services we provide guide your team and ensure that your business is compliant in all aspects of its obligations relative to SMSF.

We do if for you

Our award winning SMSF administration and accountant outsourcing services help you deliver first class SMSF administration to your trustee clients without needing to employ your own team of specialists.

We teach you

Ensure you and your staff maintain accreditation, have no knowledge gaps and are able to navigate the complexity of SMSFs with complete confidence.

We help you and your staff to:

- become more proficient;
- better understand difficult strategies or concepts;
- learn how to implement these strategies; and
- refresh or test your knowledge with confidence.

Our team of SMSF experts teach concepts using real-life scenarios that can be implemented into your practice straight away.



Meg Heffron



Lyn Formica



Leigh Mansell



Annie Dawson

On Demand

Education Bites

Our online education platform contains small learning modules on a particular SMSF topic. Each 'Bite' takes around 1 hour to complete and includes an assessment to earn CPD accreditation. [Learn more](#)

News and Insights

Whether in response to an industry update, legislation change or the Federal Budget, our online blog has you covered. Immediately available [via our website](#) and delivered to your inbox via our monthly Heffron Highlights and Super Insights newsletter. [Subscribe](#)

In-house training

Our specialist SMSF team can provide in-house training for your company with either a strategic advice or compliance focus. We tailor sessions or work with you to design an ongoing training program to suit your needs. [Get in touch for a quote](#)

Scheduled

"Concise and very relevant. Good to cross check and refresh."
Kate Kimmorley

Super Intensive Day

CPD | Annual | Full day | Virtual + F2F

Tailored specifically for superannuation and SMSF practitioners, this annual all-day CPD accredited event gives you high quality technical strategies and insights presented in our unique and engaging style. [Learn more](#)

Masterclasses

CPD | 3 in 2022 | 3.5 hours | Virtual + F2F

Intimate CPD accredited virtual workshops for smaller groups. Delve deeper into the details of a particular SMSF topic or strategy by workshopping real client scenarios and case studies. [Learn more](#)

SMSF Clinics

CPD | 5 in 2022 | 1 hour | Virtual

Join in on one of our complimentary clinics where our experts workshop and brainstorm your pre-submitted superannuation and SMSF questions live. [Learn more](#)

Webinars

Quarterly Technical Webinars

CPD | Quarterly | 1.5 hours | Virtual

These webinars focus on the practical implications of industry and Government changes that impact super funds and are tailored, allowing you to choose between an 'Accountant' or 'Adviser' focused session. [Learn more](#)

Special Webinars

CPD | Ad-hoc | 1.5 hours | Virtual

We occasionally hold Specialist Webinars for SMSF Professionals which can include a guest speakers covering a unique topic; the Federal Budget; or an event that has an impact on the industry. [Learn more](#)

We support you

Reduce the risk of non-compliance with the support of a highly skilled team of specialists who are the best technical superannuation experts in the industry.

“The Toolkit goes into all the detail I need and makes my life much easier.”

Megan Mann
PKF TAMWORTH

“Self help with confidence.”

Geoff Rooney
BDO

We help you and your staff to:

- deliver self-generated compliant documentation;
- have the answers to trustee or staff questions; and
- access in-office guidance via our Help Desk.

Our compliance documentation tools are innovative and practical solutions that support you in your own practice.

Super Toolkit

Self-generate compliant documentation with confidence in our smartest app release to date.

Each tool offers its own unique features using responsive technology to guide you with tips, warnings, and suggested phrasing to ensure everything is correct. [Learn more](#)

Transfer balance cap calculator

On July 1st 2021 the ‘transfer balance cap’ increased from \$1.6m to \$1.7m for the first time since 2017.

But not everyone gets the same increase. With our FREE handy wizard you can calculate your client’s personal transfer balance cap, and allow for their individual indexation entitlement. [Learn more](#)

Super Companion

It’s just like an online encyclopedia for superannuation.

The Super Companion goes beyond the purely technical information to give you practical, up to date insights on a host of important superannuation issues allowing you to delve deeper into a particular topic or area. [Learn more](#)

Actuarial Certificates

All your SMSF actuarial certificate needs can be met with flexible functionality, quick turnaround and plenty of support with our efficient, accurate and friendly service.

Our Actuarial Certificates come with complimentary benefits supported by your SMSF specialists.

[Learn more](#)

Help Desk

Our team of experts provide valuable and practical solutions to assist in improving efficiency and minimising risk for anyone working with SMSFs and superannuation.

Our technical packages give you priority access to our expert Technical Services Team via a dedicated free number or via email. [Sign up now](#)

Knowledge on Demand

Subscribe to our newsletter for a monthly update on all News & Insights written by our team of SMSF experts.

You can also go directly to our complimentary [Knowledge Centre](#) or [News and Insights](#) for the latest SMSF and superannuation information.

We do it for you

Increase efficiency, save time and money by partnering with Heffron for your SMSF administration.

We help reduce the risk of compliance and regulatory issues by delivering documentation that will pass audit and be accepted by the ATO everytime.

“Heffron have been outstanding with their diligence and accuracy. I also appreciate your patience. Great work!”

Tyson Wilmott

We help you and your staff to:

- deliver first class SMSF administration to your trustee clients without having to maintain your own team of specialists, and
- quickly answer trustee questions through your own dedicated Customer Relationship Manager as your point of contact.

Why work with Heffron?

We have been awarded the SMSF Adviser’s SMSF Administrator of the Year three years running.

You can rely on us to do it right every time.



Compliant documentation services

High quality SMSF document preparation is an essential part of the SMSF compliance process.

Our SMSF Document Service and Super Toolkit support accountants and advisers to get the right compliance records in place for their clients.

Adviser Pricing:

Our administration package is designed to provide flexibility for advisers and their clients’ needs, while ensuring that all compliance and regulatory requirements are met including EOFY financial, tax returns and audit.

Accountant Pricing:

We operate as your back-office solution, responsible for the administration of your book of SMSFs including accounting, financials, tax returns and audit, using either your software or ours.

What makes our service superior?

Unique customer support

Our team of SMSF specialists is led by a Customer Relationship Manager as your direct point of contact.

We provide contribution and pension strategy support and insights through regular contact by our accounting and technical teams.

We pride ourselves on making your life as a Heffron client super informed and super easy.

24/7 access to our online administration portal

Easily track your client’s progress through lodgement.

You can access a global view of your funds or click into the details within each fund.

View or download critical documents and access regularly updated records including member balances to give you full transparency.

Transitioning your funds to us:

We ensure the transition from your previous administrator is a seamless experience by providing tailored options to suit your needs.

As your fund(s) are onboarded, they will be added to your Heffron Administration Portal. There you can access fund details / documents and work directly with the team looking after your fund(s). If you have any queries during the transition period our transitions team or your dedicated Client Relationship Manager can help you.

Set up an SMSF OR Transition a fund to us

Find out about our [transition process](#)

“Great responsiveness. Easy to deal with via client portal.”

Steve Nielsen

Our service is delivered through real relationships

Meet Kylie Hancock

Client Relationship Manager

Kylie is one of our valued CRMs and leads a team of SMSF specialists working hard to give you proactive support and strategic insights.

Kylie is a direct point of contact for clients who take up our SMSF administration service and need help to manage client funds as part of their service.

“ I am very happy with Heffron’s service and would like to thank Kylie Hancock and other team members for looking after our account so well. ”

Dr Matthew Duthy
SMSF Administration client

Visit www.heffron.com.au to learn more





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

POSTAL

PO Box 200
Maitland NSW 2320

QLD

Level 15, 120 Edward Street
Brisbane QLD 4000