



60 Second Health Check Questionnaire

1. Is your Trust Deed less than 3 years old? Yes No
2. Do you have a Special Purpose Corporate Trustee for your SMSF? Yes No
3. Do you have a current investment strategy? Yes No
4. Is your fund GST registered? Yes No
5. Are your death benefit nominations current and still appropriate for your circumstances? Yes No
6. Is your fund paying a pension to any member? And if yes, are your pension documents complete and outline all terms of your pension(s)? Yes No