



60 Second Health Check

At Xpress Super, we are proactive and forward thinking to ensure our clients receive the best possible advice when it comes to their retirement savings.

If you answer 'no' to any of the questions below, you need to speak to us!

- | | | |
|------------------------------|-----------------------------|--|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Do you have a documented plan for what happens if one or more members in your SMSF become incapacitated? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Do you have an Enduring Power of Attorney in place for each member? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Do you have a Special Purpose Corporate Trustee for your SMSF? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Have you considered how your member balances affect your non-dependents? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Have you had advice on reversionary pensions? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Is your Trust Deed less than 3 years old? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Are your death benefit nominations current and still appropriate for your circumstances? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Do you have a current investment strategy? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Are you familiar with the changes to contribution caps and how they are relevant to you? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Do you know when you convert your fund to a tax free environment? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Do you know how your current member balances are split/allocated between tax free and taxable components and how that impacts your death benefit payout? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Are your tax free components being separated and preserved where possible? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Do you know what a re-contribution strategy is? |

For an obligation free consultation, please call us on 1300 216 890.

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