



# Self Managed Superannuation Fund Advice

## Why Merit Wealth?

Merit Wealth is a boutique Australian Financial Services Licensed company that bridges the gap between you, your accountant, and financial services professionals.

In 2016, the laws governing Self Managed Superannuation Fund (SMSF) advice changed. Accountants now need to be licensed to talk to and advise clients about SMSFs.

Established in 2010, today Merit Wealth has SMSF advisers across Australia. So, if you are looking for SMSF advice, an experienced and qualified Merit Wealth limited adviser can help.

## Self Managed Superannuation Funds

Many Australians take control of their retirement savings by choosing a Self Managed Superannuation Fund. As experts in self managed superannuation, a Merit Wealth limited adviser can help you decide if a SMSF is right for you.

## Limited SMSF Advice

A Merit Wealth limited adviser is authorised to provide advice on:

- Should I have a SMSF?
- Contributions
- Withdrawals
- Pensions

## Further Advice

A Merit Wealth limited adviser has access to the broader Merit Wealth adviser network to provide further advice on:

- Rolling over superannuation
- Investment Strategies
- Investment Portfolio Construction
- Insurances

This publication is dated June 2016 and has been prepared by Merit Wealth Pty Ltd, ABN 89 125 557 002 under Australian Financial Services Licence No. 409361, ("Merit Wealth"). Merit Wealth is wholly owned by Hayes Knight Financial Services Pty Ltd, (HKFS). HKFS is a subsidiary of Easton Distribution Services Pty Ltd (ABN 67 167 184 072), a wholly owned subsidiary of Easton Investments Limited (ABN 48 111 695 357), (EAS) an ASX listed company. This information has been given in good faith and has, where applicable, been derived from sources believed to be accurate at issue date. However, it should not be considered a comprehensive statement on any matter nor relied upon as such. Merit Wealth Pty Ltd recommends that you obtain further information and conduct your own due diligence on the services it is offering and obtain your own professional advice on what is appropriate for you. This information has been prepared without taking into account your objectives, financial situation, or needs. Before acting on this information consider its appropriateness. © Merit Wealth Pty Ltd