

## SMSF Readiness Checklist: Are You Prepared to Take Control of Your Super?

Managing a Self-Managed Super Fund (SMSF) comes with unique benefits, but it also requires time, effort, and expertise. Take this quick checklist to see if you're ready!

### Financial Readiness

- Do you have at least \$200,000 in super (or expect to soon)?
- Are you comfortable with investment risk and making financial decisions?
- Have you considered the costs of running an SMSF (accounting, auditing, compliance)?

### Investment Knowledge & Strategy

- Do you have experience investing in shares, property, or other assets?
- Are you confident in creating and managing an investment strategy?
- Do you want access to a broader range of investment options?

### Time & Commitment

- Are you prepared to dedicate time to managing your SMSF?
- Do you understand the legal and tax obligations of running an SMSF?
- Will you keep up with ongoing compliance and reporting requirements?

### Seeking Professional Support

- Do you have a financial adviser or accountant to help with SMSF management?
- Would you like expert guidance to ensure your fund remains compliant and tax-efficient?

### What's Your Score?

✓ Mostly YES? You could be a great candidate for an SMSF! Let's discuss your options. [Book a Consultation.](#)

✗ Mostly NO? An SMSF may not be the best fit right now. But we can help explore other wealth-building strategies.

Still unsure? Our SMSF specialists are here to help. Get in touch today for personalised advice!