



SMSF Connect Education Resource

Enhance your website
with independent
information for
SMSF trustees

The SMSF Association is always looking for ways to support and add value to our Specialist members. We are conscious that educating your SMSF clients, particularly through periods of change and uncertainty, is a continued commitment of your time and resources.

We are pleased to bring you our SMSF Connect Education Resource, enabling you to offer SMSF education resources via a co-branded portal to your valued clients.

ASIC Report 575 emphasises the importance of consumers making informed decisions regarding SMSFs. Further, it encourages practitioners providing advice on SMSFs to take the necessary steps to provide information on the duties and obligations of an SMSF trustee.

With many different sources of SMSF information available online, it is difficult to keep track of where your clients may be gathering their information. Direct your clients to independent SMSF information from the SMSF Association via your co-branded SMSF Education Resource portal.

This education portal will:

- Provide you and your clients with a wealth of quality information and education resources (via SMSF Connect, the SMSF Association's regularly updated trustee platform), providing you with a simple solution to help meet recent ASIC 575 guidelines (requiring provision of SMSF education for trustees) and ATO compliance.
- Add value to your website and client services.
- Keep your clients on your website and direct them to a co-branded resource showcasing your brand alongside that of the SMSF Association, the peak professional body representing the SMSF sector.

"A current resource of factual information for trustees to access, which allows my clients and I to make more informed decisions."

**Chris Launer, SMSF Specialist
Advisor (SSA), Partner, Pinnacle
Wealth Management**

If you have any further questions
please contact the SMSF Association
Head Office on: 08 8205 1900 or
E: memberservices@smsfassociation.com

Terms and Conditions

To implement this portal you will be required to acknowledge a simple licensing agreement which covers the nature of the education materials and interaction with your website.



What's included?

Information and resources available via a secure, co-branded portal

Regularly updated compliance resources

Latest news updates on topical SMSF issues

Investment information on diversification, portfolio construction, markets, industries and trends and key asset classes

Opportunities for your clients to seek your guidance on the information contained throughout the portal through the 'Need Assistance?' button in main navigation

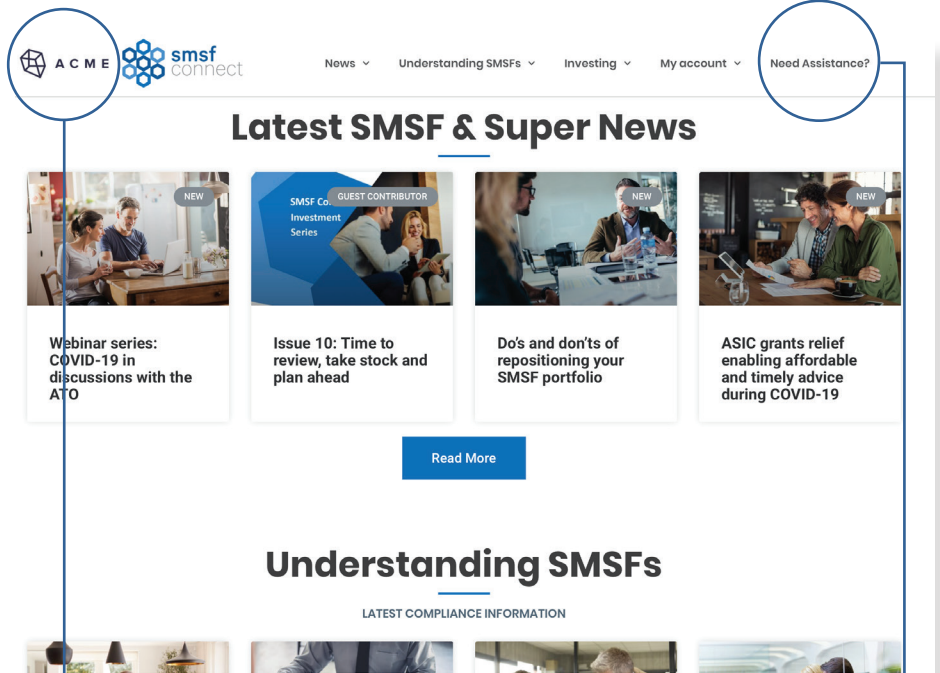
Monthly featured content newsletter to help you drive clients back to your co-branded portal and website

Cost

The cost of this resource includes a one-time set up fee of \$300 (+GST), and an ongoing monthly fee of \$100 (+GST) per month.

How to register

If you are a company with at least 1 SMSF Association Specialist member, and interested in adding this resource to your website, [please click here to fill in the online webform.](#)



Your logo positioned here

'Need Assistance?' links to your 'Contact Us' page provided upon registration to direct clients back to your advice services