

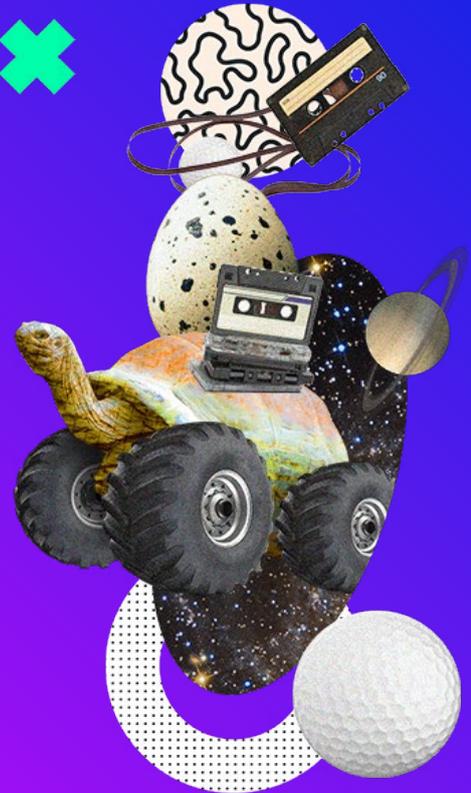
BlueRock  / SMSF & Private Wealth



# Self Managed Super Funds Made Easy

## BlueRock's SMSF Package

Our holistic and tailored superannuation strategies give you the confidence and freedom to focus on the more enjoyable things in life.



# Why Choose BlueRock for Your SMSF Needs?

## Our Experienced and Multidisciplinary Team

We combine the experience and knowledge of our financial planning and investment team with that of our accounting and compliance team to give you the best advice on all things SMSF.

### Great Value for Money With Our Fixed-fee Compliance Package

- ✓ Live data updates and monthly reconciliations
- ✓ Regular contribution and pension updates
- ✓ Annual Financial Statements
- ✓ Independent SMSF audits
- ✓ Guidance on superannuation law
- ✓ Easy access to your fund's portfolio via our online portal
- ✓ ATO compliance obligations
- ✓ Annual Tax Returns and lodgement
- ✓ An actuarial certificate (if required)
- ✓ A dedicated SMSF specialist accountant you can talk to

# Our Holistic Advisory Approach to Your SMSF Strategy

## Strategic Wealth Creation and Retirement Planning



Goals-based, comprehensive advice on your superannuation fund



Comprehensive SMSF investment and wealth accumulation strategies



SMSF tax planning (how to utilise the superannuation environment to grow your wealth in a tax-efficient manner)



Advice on SMSF contributions and pensions



Estate planning specific to your SMSF needs



Advice on property acquisition within your SMSF



Advice on direct investment opportunities only accessible via an SMSF



Frequent reviews of your investment strategies

# Our BlueRock SMSF Package in Action

Here is an example of how we would typically structure your SMSF package, which can be actively managed on your behalf, to achieve a balance of investment flexibility, functionality and cost effectiveness. It's important to note that while the account structure below has been selected to provide active and timely investment management and efficient reporting, and to limit unnecessary administration costs, the underlying investments will always be tailored to your specific situation and needs.

1

Utilise Mason Stevens as a low-cost yet extremely flexible investment platform to hold your SMSF investments

2

Make an investment through the BlueRock Managed Discretionary Account

3

Choose between a low-cost Exchange Traded Fund option, or an actively managed Alpha-focused structure with direct equity holdings available for sophisticated investors only

4

Get access to direct domestic and international equities, bonds, managed funds, exchange traded funds (ETFs) and currency

5

Optimise your superannuation strategy and reap the rewards

## Contact Us Today!

Please get in touch with our BlueRock SMSF team to talk through your situation and goals.



**George Karavias**

**Director, Superannuation**

george.karavias@thebluerock.com.au  
0403 206 413



**Leigh Fernando**

**Director, Private Wealth**

leigh.fernando@thebluerock.com.au  
0468 948 149

[www.bluerock.com.au](http://www.bluerock.com.au)