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## Introducing Evolution Super – a self managed superannuation fund administration service

Managing superannuation can be rewarding, both financially and personally. The potential tax benefits of superannuation, combined with the ability to be in control of your investments, make self managed super funds a valuable investment vehicle.

But, self managed super funds can also come with unforeseen burdens – administrative obligations, rigorous compliance monitoring and increasingly strict reporting requirements. Combined, these can often be both time consuming and challenging for even the most diligent investor.

At Evolution Super, we take the journey with you by offering a full range of services to Trustees of self managed superannuation funds, to take the worry out of managing your own Fund.

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## How Evolution Super can help

### **FAST, ACCURATE AND RELIABLE ADMINISTRATION**

Administering investments efficiently on any scale requires proven processes, capable people and technology systems that allow for growth and change. Evolution Super has the commitment and financial strength to continue to invest in technology, ensuring future administrative effectiveness and efficiency.

Evolution Super combines market leading administration and technology, with people who are experienced, capable and passionate about delivering excellent service.

Evolution Super brings a new standard in administrative expertise, technology and compliance support.

The benefit for you is worry-free control of your self managed super fund. All your Fund administrative obligations are handled by the one comprehensive service which includes:

- > Processing of all bank accounts and investment transactions
- > Filing of all Fund paperwork
- > Maintenance of Fund and Member details
- > Attending to all Fund correspondence
- > Preparation of annual Special Purpose Financial Statements
- > Preparation of annual Member Benefit Statements
- > Preparation of Trustee Meeting Minutes
- > Annual contributions reporting
- > Tax liability calculations including Capital Gains Tax tracking
- > Preparation and lodgment of Business Activity Statements or Instalment Activity Documents
- > Preparation of ETP benefit payment summaries and the calculation of tax to be withheld
- > Preparation of Allocated, Term Allocated, Transition to Retirement Income Stream and Account Based Pension reports, calculating the payments, tax to be withheld, rebates and deductions required for each pension



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## How Evolution Super can help

- > Organise and facilitate the actuary in calculating existing Complying Lifetime/Fixed Term and Commutable Lifetime/Fixed Term Pensions
- > Preparation of payment summaries for all pensions
- > Organise and facilitate the Fund's audit and tax agency
- > Management of communication between trustees, directors, Australian Taxation Office and any other party and the Evolution Super accountant regarding compliance, ATO issues, meetings etc

### **SUPPORTING ACCOUNTANT AND FINANCIAL PLANNING RELATIONSHIPS**

Evolution Super recognises the value of strong relationships. With this in mind, Evolution Super has developed an administration tool that integrates seamlessly into existing infrastructures without additional administration burden for you or the client.

Committed to a flexible approach, Evolution Super allows the accountant to determine and retain the level of control best suited to the client's needs. Evolution Super can arrange the Fund's audit, while allowing full access to all audit working papers and Fund documentation for the accountant. It can maintain any existing relationships with Fund auditors and can provide its own actuarial service provider should the client require.

Evolution Super can handle numerous investment platforms. These include Macquarie Wrap, BT Wrap and Praemium Accounts. With the use of BGL Simple Fund accounting software, we provide a low cost SMSF administration service. Evolution Super will also cater to all pension types - from allocated pensions and defined pensions, to transition and retirement income streams and account based pensions

A product that is as secure as it is flexible, Evolution Super works closely with existing professional advisers to provide integrated, tailored support.

# A Total Compliance Solution

## **SELF MANAGED SUPERANNUATION FUNDS COMPLIANCE**

Evolution Super also provides a total compliance solution for Self Managed Superannuation Funds encompassing:

- > SMSF Trust Deed Establishment
- > Special Purpose Trustee Companies
- > Amendments to Existing SMSF Trust Deeds
- > Special SMSF Compliance Documents

With superannuation laws constantly changing, it is virtually impossible for Trustees of their own SMSF to have peace of mind that the activities they undertake in their Fund are legally compliant. With Evolution Super, individuals can feel secure that their affairs are established, regularly monitored and reviewed for legal complicity.

Evolution Super will also monitor and advise on legislative changes providing further opportunities for its clientele including:

- > Members ages 55 or more accessing benefits before retirement
- > Splitting super contributions with your spouse
- > Adding non-working members (eg.spouse, children, etc)
- > Making contributions up to age 65 without the need to meet the work test
- > Having the ability to make contributions up to age 75
- > Having the ability to make contributions on your children's behalf
- > Enabling borrowing in the SMSF
- > Establishing a non-commutable pension (transition to retirement income stream)
- > Establishing a term allocated pension
- > Establishing an account based pension
- > Creating flexible income streams in retirement to complement your lifestyle

Importantly, Evolution Super wants to ensure that your arrangements are flexible enough to handle a plan that is specifically tailored to looking after your family's particular needs.



## Evolution Super is ready to go on the journey with you

### **EVOLUTION SUPER TECHNICAL & STRATEGIC SERVICES**

Evolution Super also provides a specialised technical and strategic solution to enable you to stay at the cutting edge of SIS legislation and ITAA and their effects on superannuation.

Superannuation is an important tool to use for people accumulating wealth and estate planning. With the constant changes to Super over the years it is a difficult task to keep up to date, and it is imperative to get any strategic plan done right. Our experienced authorised representatives will be available to you to solve any superannuation technical or strategic query in a prompt manner.

Treasury, ATO and ASIC updates can be provided to you via email so you stay ahead of the field.

Statements of Advice can be provided to you for the more complex strategic plans such as the transition to retirement income stream strategy.

### **EVOLUTION ASSET MANAGER**

Evolution Super understands that you want to make informed decisions on your Fund's investments without the headache of receiving the mountain of paperwork associated with each investment.

Evolution Super can provide a low cost virtual asset management platform to solve this problem.

You continue to make all the decisions on your investments and the asset manager will provide you with the ability to view an updated investment portfolio online daily.

Evolution Super becomes the mailing house for your Fund's investment paperwork and the asset manager integrates with your bank account and broker and all bank transactions, investment buys and sells, corporate actions and tax reports will be available to view online. The asset manager offers a range of useful reports that will enhance your day to day decision making.

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# The Future of Super

Evolution Super is the future of optimally administrated Self Managed Superannuation Funds. Not only are we committed to providing an accurate, timely and professional administration and compliance service but also developing new ways to expand our service offering to you and to provide the information you need to make the important decisions about your superannuation.

For all enquiries and detailed product information, please contact one of the Evolution Super representatives or email: [admin@evolutionsuper.com.au](mailto:admin@evolutionsuper.com.au)



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