

SMSF Investment Strategy

Fund information

- The name of the fund.
- The name and address details of the members.

Trustee details

- Whether the trustee is a company.
 - if yes, then provide:
 - company name and ACN.
 - the number of directors the corporate trustee has.
 - whether the corporate trustee will execute the investment strategy by affixing its common seal.
 - if the trustee is not a company then provide:
 - the name of the trustees.

Investment strategy details

- Whether the fund seeks to achieve pre-tax investment returns equal to or greater than CPI.
- The maximum level of investment the fund will permit for each asset class.
- The maximum level of loan to valuation ratio the fund will permit.
- Whether the fund is permitted to invest in derivatives.

Meeting details

- Details of the meeting to review the fund's investment strategy:
 - attendees of the meeting.
 - person who will chair the meeting.
 - the venue, date and time that the meeting will be held.

To create a SMSF Investment Strategy document package, you need to provide the information listed to the left. Print this checklist out for convenience and gather the information before you start online.

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