

Self Managed Super Funds

At Bee Group Accountants, we're here to assist you with managing all the administrative, accounting, and taxation requirements for your Self Managed Superannuation Fund (SMSF).

We offer a comprehensive service that covers every aspect of managing your fund. We handle all the administrative tasks, from taking care of paperwork and reporting to providing support to ensure you meet the ever changing superannuation and taxation regulations.

Fixed Fee Structure That Includes:

- Preparation of the year-end financial statements of the fund
- Preparation and lodgement of the funds annual income tax and regulatory return
- Instructing and facilitating the funds annual independent audit
- Obtaining actual certificates (as required)
- Preparation of supporting minutes for transactions during the year
- Acting as ASIC registered office for corporate trustee
- Corresponding with the Australian Taxation Office on fund tax matters
- Attending to commencement and maintenance of pensions
- Mail box for use for your fund administration documents
- SMSF reports accessible online on an agreed monthly basis (subject to bank and investment feeds)
- Maintenance of permanent records of the fund



Managing the Paperwork

We can receive and act on the paperwork throughout the year relating to the investments.

Receipt Management

We give you access to a Dext account where you can securely store all of the receipts for your transactions. So there's no risk of theft, loss or data corruption by storing it on your local computer. That way if something happens to your laptop, your data remains safe and you can be straight back to work with a new one.




Real Time Data

We use the Class platform for the administration of all of our superannuation funds. Subject to bank feeds, you can get regular insight into the performance of your fund. This ensures that you stay informed and in control.

⊕ Specialist Advice

Provision of advice in relation to taxation matters of the fund, including contributions and withdrawal strategies and tax planning for asset realisation.

Make the most of the tax advantages that come through investment through your SMSF by discussing your options. You remain in control by choosing the level of service that best suits your needs and budget.

	ANNUAL	PLUS	PRO
	 FROM \$180 PER MON TH	 FROM \$250 PER MON TH	 FROM \$300 PER MON TH
Services (Deliverables)			
Cash Basis Bookkeeping	Annual	Quarterly	Monthly
Profit & Loss and Balance Sheet*		Half Yearly	✓
End of Financial Year Financial Statements	✓	✓	✓
End of Financial Year Tax Package	✓	✓	✓
Document Service		✓	✓
ASIC Agent Annual Review	✓	✓	✓
Annual Audit at Base Fee (by third party auditor) Complex or Contraventions may incur additional charge	✓	✓	✓
Support (Level of Access)			
Dedicated SMSF Accountant	✓	✓	✓
Access and Support	Priority Support – 48 hour response via Email	Priority Support – 48 hour response via Email	Premium Support – 24 hour response
Technology (Apps used in Plans)			
Class	✓	✓	✓
Dext	✓	✓	✓
Additional Services As Required			
⊕ Actuarial Certificate	⊕ Share Trading & Investments (3 or more)	⊕ Retirement Tax Planning	
⊕ Cryptocurrency Investments	⊕ Rental Properties (2 or more)	⊕ Specialist Advice	



For more information, please visit our website.