

YOUR SUPER

Set up a SMSF - Self Managed Super Fund

Easy as 1,2,3...

Buy a Property !

- Use your Super NOW
- Why wait until retirement ?
- Do you, your partner or family have \$90,000 or more ?

OTHER SERVICES

- > INVESTMENT
- > OWNER OCCUPIER
- > 1ST HOME BUYERS
- > FINANCE

Dale ' Rowdy ' Shearer

0418 744100



NO COSTS involved with any of our representatives until you proceed.

Step 1. ASSESSMENT (No cost)

Discuss with the SMSF representative

- **Can I qualify**
- **Benefits of a SMSF**
- **Everything is paid by your Super Fund**

General set up of SMSF (Property purchase)

(includes Statement of Advice & Financial Certificate)

- **\$ 1,980. One off fee paid by your super not you**
- **2 to 3 days estimated time**
- **Rollover existing super fund. 2 - 4 weeks**

Step 2. FINANCE

- **After the SMSF representative has qualified you, finance needs to be arranged**
- **The finance broker will base your application on the amount in your fund, your annual contributions to your Super and the rent received (on your potential SMSF property)**
- **The loan amount will revolve around the potential property you want and they will look to have this pre-approved**

**** We also have financiers for all types of situations. House and Land. 1st Home buyers, Development etc**

Create a Wealthier & Healthier Lifestyle



Step 3. PROPERTY

- We select a number of properties for you to choose from. The majority based on location, median price, tenants, new not old, schools, transport, shops, close to City etc
- Submit the financial loan & settle on property. * conditions apply
- **HAPPY DAYS !** - You own a property



ADVANTAGES OF SMSF

- Provide you with the opportunity to reduce income tax on investment income and capital gains;
- Increase the flexibility of investment choices and the asset selection;
- Provide control over your total investment portfolio, with the ability to take account of the risk profile of all your assets, including those held outside superannuation;
- Have between 1- 4 members in the fund and allow the pooling of resources of others with similar financial objectives (for example, a family unit);
- Have the opportunity to borrow or gear an investment, via limited recourse borrowing arrangements (LRBAs),

Testimonials

Dale understands it where others don't. Customers are at the heart of what this group does and nothing is a problem. The communication is second to none and the professionalism in which Dale and his team conduct themselves is outstanding ! **Highly recommended ! Dennis & Yvonne**

Admire his passion and drive. His ability to liaise with various walks of people is impressive. Motivates myself to achieve higher results **C Shaxson**

Extremely impressed with financial and property information provided especially having a background of 15 years in banking and 10 years of real estate myself. On - going assistance has been superb. **Amanda P**



**DALE SHEARER
PROPERTY**

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General advice disclaimer: This document contains general information only. You need to consider with your financial planner, your investment objectives, financial situation and your particular needs prior to making an investment decision.