

Now and into the future, with the assistance of a SPAA SMSF Specialist, those Australians choosing the control and flexibility of managing their own superannuation can do so with confidence.

You can place your trust in professionals with the SPAA SMSF Specialist designation.

SPAA

SMSF
Professionals'
Association
of Australia

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**Control your
Self-Managed
Super Fund with
confidence**



SOCIUS
WEALTH MANAGEMENT

About us

Socius Wealth Management is a boutique financial advisory firm that delivers tailored financial strategies to help its clients meet their lifestyle and financial goals. Socius (pronounced so-she-us) is latin meaning ally or partner.

Our team of professionals will partner with you to achieve your objectives. At Socius, we recognise that the quality and experience of our team is the key to our success, and more importantly, to your financial well-being. Our team of financial planners pride themselves on their professionalism and client-centric focus, and will work with you to help create a life of choice and opportunity.

About Self-Managed Super Funds

Self-Managed Super Funds (SMSFs) have become a popular choice for Australians wishing to take on the responsibility and control of managing their retirement savings. Almost 2,500 new SMSFs are being established each month and SMSFs now account for approximately \$420 billion, or one third of the total superannuation pool of assets.

Whilst establishing your own SMSF offers you greater control and flexibility over your super, it also imposes the responsibility of complying with complex legislative and administration requirements. Enlisting the services of a specialist SMSF professional will assist with ensuring your fund's compliance, that you meet your trustee obligations, and that you optimise the benefits of having an SMSF.

Building SMSF Professionals

The SMSF Professionals' Association of Australia (SPAA) is the peak industry association for professionals offering services in the SMSF sector. SPAA is committed to building a sector with integrity by establishing standards and raising the level of specialist expertise.

Identifying an SMSF Specialist

Many practitioners in the SMSF sector claim to be a specialist, but only professionals with the SPAA SMSF Specialist™ designation have earned this title by successfully completing the SPAA Accreditation Program. This was the first, and still is the most widely recognised program that offers independent verification and certification of specialists in the SMSF field.

In addition to testing their knowledge of SMSF legislation and regulatory requirements, the program also assesses their business and ethical practices to ensure "best practice" standards are adhered to. Each SPAA SMSF Specialist™ has attained the benchmark in professional standards set by SPAA, and has committed to maintaining their SMSF competence and expertise through ongoing professional development.

Professionals that have achieved accreditation with SPAA may be an SMSF Specialist Advisor™ (SSA™) and/or an SMSF Specialist Auditor (SSAud®). The status of SPAA SMSF Specialists is officially identified by the logo below.

