

**Launching the SMSF Check-Up Report to your clients – August 2023**

**4 templated emails to copy and paste into your CRM**

1. **Introducing the SMSF Check-Up Report Service**
	1. Launching the new service to one or more of your SMSF clients with the option to opt-out
2. **Schedule time to present the report**
	1. Once the report is generated, schedule a time to present the report and its findings.
3. **Post-report meeting follow-up**
	1. After you have presented the report, use this follow-up email to document the various action items.
4. **SMSF Check-Up Report annual review**
	1. Keep delivering value by offering this service annually and ensure all key aspects of the funds financial objectives and compliance requirements are on track.

**NOTE:** From 1st October 2023, accountantsGPS will provide the functionality to create 3 reports for the same fund pa, at no additional cost. This will enable you to demonstrate your progress to clients when acting on any ‘Red’ items in order to improves the funds overall position.



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**Email 1 - Introducing the SMSF Check-Up Report Service**

Subject line: SMSF Check-Up Report Service

Dear <SMSF Client Details>

I’d like to introduce you to a new service that <firm’s name> is offering exclusively to our Self-Managed Super Fund (SMSF) clients.

An Australian first, this unique and valuable service is provided through our SMSF Administrators BGL Corporate Solutions and their relationship partner accountantsGPS.

The SMSF Check-Up Report helps us see what’s happening in your fund and provide better information and guidance on meeting your SMSF objectives through state-of-the-art data and analyses.

Online and secure, the SMSF Check-Up Report uses the latest technology to deliver a detailed, digitally generated analysis of your SMSF.

 **Benefits to you**

* Get greater assurance your fund is meeting its compliance and regulatory obligations.
* Determine your fund’s current position relative to your longer-term financial goals.
* Discover which parts of the fund needs attention and know the most effective way to prioritise with a traffic light system.
* Get week’s of expensive manual research and analysis at an affordable price.

**Next steps**

As your accountants, we feel it is in your best interests to have the report undertaken as part of your package of services with us.

We will order the report on your behalf and be in touch with you to schedule a time to discuss its findings and take any actions required.

If you do not wish to include the report as part of your package of services, please advise us of your preference to opt-out by <date – suggest 3 working days>.

**SMSF Check-Up Report presentation**

Once we have generated the report, we’ll arrange to meet with you and/or the fund’s trustees and member/s to review the findings.

To save time, we’ll only go over the specific areas that need attention in order to meet your funds regulatory and financial requirements and keep you on track towards your financial objectives.

**Fees**

Fees are paid from your SMSF and cover the report and time to meet with you to discuss the report findings.

* Initial SMSF check-up Report $550 (inc. GST)
* 2nd or subsequent Years annual review process SMSF Check-Up Report $330 (inc. GST)

*Note: These are the RRP – which the firm can vary if it wishes, in addition to offering an annual review service.*

The fee received by <firm name> includes the cost of completing any details that can’t be accessed by BGL or accountantsGPS, and to review the report before we present it to you. Full details are enclosed in the report.

We look forward to meeting with you to go over your SMSF Check-Up Report and help ensure your fund is in the healthiest state possible.

Please feel free to call me/office should you have any questions regarding this new service.

**Email 2 -** **Scheduling email to present the report**

Subject line: Your SMSF Check-Up Report has been generated: scheduling a time to meet

Dear <client’s name>,

We recently completed an SMSF Check-Up report for your fund, and it identified several specific items which (may) require attention to meet the fund’s regulatory and financial requirements.

We’d like to review the report with you, preferably in person, or via video conference, as soon as convenient.

To book an appointment, please select a suitable date and time to meet at our offices, *<Appointment Scheduling Process?>.* Report presentations usually only take around one hour.

We look forward to seeing you again and discussing your SMSF Check-Up Report with you.

**Book your appointment**

To schedule an appointment that’s convenient for you, please

Call us on <firm’s phone number>

Use our online booking portal

Of course, if you have any questions, please don’t hesitate to get in touch with us/me by phone on <contact phone number> or by email <contact email>.

**Email 3 -** **Post-report meeting follow-up email**

Subject line: Your SMSF Check-Up Report: actions agreed

Dear <client’s name>

Thank you for meeting with us to review your recent SMSF Check-Up Report.

As mentioned, your SMSF Check-Up Report provides the data and analysis for us to see what’s behind your SMSF’s numbers, so we can better inform and guide you on how to best meet your financial objectives.

As discussed, the outcomes of the review have identified the following areas requiring attention <*select the areas to action, or delete items not required>:*

* Investment policy and portfolio review
* Documents
* Contribution strategies
* Estate planning
* Insurance
* Retirement planning
* Property review
* LRBA Loans

As agreed, we’ll start engaging the relevant providers for each of the above areas, so they can commence the work required to update your position.

Please note, you may be contacted either by our office to progress the work for each service, or by the provider directly.

Thank you again, and we look forward to progressing this important work with your support.

 **Get in touch**

If you’d like to discuss anything about the report, your SMSF, or the professional service providers, please do not hesitate to contact me/our office on <contact number> or by email, <contact email>.

**Email 4 - Annual review email**

Subject line: Your SMSF Check-Up Report: annual review

Dear <client name>

We’ve arrived at that time of year again, which means getting ready for an annual review of your Self-Managed Super Fund (SMSF).

We’ll soon start the process of generating your latest SMSF Check-Up Review Report.

The report will provide updated information and state-of-the-art analysis that helps us ensure your fund is meeting its compliance and regulatory obligation and its position relative to your longer-term financial goals.

**SMSF Check-Up review**

Once we have generated the report, we’ll arrange to meet with you and/or the fund’s trustees and member/s to review the findings.

To save time, we’ll only go over the specific areas that need attention in order to meet your funds regulatory and financial requirements and keep you on track towards your financial objectives.

**Fees**

Fees are paid from your SMSF and cover the report and time to meet with you to discuss the report findings.

* 2nd Year annual review process SMSF Check-Up Report $330 (inc. GST)

We look forward to meeting with you to go over your SMSF Check-Up Report and help ensure your fund continues to be in the healthiest state possible.

Please feel free to call me/office should you have any questions.

Note to practice: This is not a templated email and should NOT be sent to clients. This is for the accountant that is preparing to present an SMSF Check-Up Report.

**Top Tips for Successfully Presenting an SMSF Check-Up Report**

Each SMSF Check-Up Report gives you the power to look beyond basic financial information and examine your clients’ fund in depth.

This means you can identify and discuss ways that both trustees and members can enhance their positions across multiple areas, with the goal of helping them achieve their objectives.

Here’s how to get the most out of your report presentation meeting.

**Time:** Allow one hour to present the report to the trustees and/or members

**Review:** Re-read the report and familiarise yourself with the overall findings and potential improvements or opportunities identified to enhance the funds and member position.

**Copies:** Ensure there is a copy of the report for each participant.

**Pinpoint:** Select key aspects of the findings you feel will be most relevant or important to the members.

**Value-add:** If additional financial services are required, you have the option of using the accountantsGPS approved service partners, your own in-house financial services offering or those of your referral partner.

**Follow-up:** Once the meeting is completed, send out the post-report meeting follow-up email confirming each action item.

Now you’re ready to start sending emails to your SMSF clients and generating reports.

If you need assistance or have a question about getting started, please contact us at support@accountantsgps.com.au