

WHY USE THE HEFFRON SMSF ACTUARIAL SERVICE?

Obtaining an actuarial certificate for a SMSF paying a pension may seem like an insignificant step in the overall annual accounting process. However, poor service through delays or possibly errors caused by the misinterpretation of information can create a significant headache for you.

Our Actuarial Certificate service draws upon the extensive practical superannuation experience of Heffron to ensure that the service delivery is structured in the best possible way for you.

The “value add” benefits of the Heffron service for you are:

- **No form required** – we are happy to agree up-front on a preferred method and format of exchanging information. We do not force you to comply with a set system or complete various spreadsheets. We can provide you with a template form setting out the information we need and you can then use this to create your own document to streamline your internal process of ordering the actuarial certificate from us;
- **Quick Turnaround** – We offer extremely quick turnaround, even with our flexible approach in accepting information. A typical client experience (where all information has been provided up front and there are no queries) is that the certificate is despatched electronically back to you within 24 hours. We can also expedite urgent requests as applicable;
- **Excellent coverage** - we have two in-house actuaries plus two additional staff members who are skilled and experienced in carrying out the requisite calculations – giving you four people to speak to if you need to understand something about your certificate and no delays due to one person’s leave;
- **Technical backbone** - we participate in the various IAA committees that draft guidance notes on issues pertaining these certificates – you can be confident we know what we are doing and any required legislative or regulatory changes will automatically be incorporated in your clients’ actuarial certificates; and
- **Technical support** - we have very broad superannuation knowledge – we are SMSF experts and are not limited simply to providing actuarial certificates. While our certificate service fee does not include specific advice, our broader knowledge often means that we spot problems/opportunities and communicate these to you as part of the service.

For further information on Heffron’s Actuarial Service please call 1300 172 247 or go to www.heffron.com.au/services/actuarialcertificates