Heffron

# SMSF set up: *Steps & estimated timeline*

**You choose Heffron**

**Welcome to Heffron!**
We provide you with knowledge and support to help you set up and manage your SMSF

**1** — **You complete our online Fund Establishment Form** so we can get started

1 day

**2** — **You sign consent forms & complete your identity verification** for added security against fraud

1 day

**3** — **We prepare your fund establishment documents** and post them to you in 5 business days

5 days

**4** — **You review, sign & return** your completed documents to us

1 day

**5** — **We review your documents** to make sure everything is signed and executed correctly

1 day

**6** — **We apply for your Fund ABN & TFN** then register it with the ATO

1 day

**NB:** The ATO estimate 56+ calendar days to issue the Fund ABN.

1–60 days

**7** — **We let you know when your fund is officially registered** and has been granted complying status by the ATO

**NB:** The ATO estimate 5+ business days for complying status to be granted, this may take longer due to delays that are outside our control. We will inform you of delays.

5 days

**8** — **You login to our online portal** to view details, documents, news, insights and start a conversation

**9** — **You will receive your original signed documents** in a Heffron binder for safekeeping

**You're all set! You can now:**

1. Open your SMSF's bank and investment accounts.
2. Roll over existing superannuation and/or make contributions.
3. Finalise your investment strategy.
4. Nominate your beneficiaries.
5. Consider appropriate insurance.