



MARCUS TODAY
INVESTMENT STRATEGISTS PTY LTD
ABN: 66 603 432 60



SMSF Advice & Admin

We are a team of leading professionals who have many years' experience establishing and managing Self-Managed Superannuation Funds (SMSF) for our clients. Having worked through our own self-managed super funds, we know intimately the process, legalities and regulatory requirements to make the most out of this sector. One size doesn't fit all and we can advise you on whether a SMSF suits your needs and will help your personal wealth program. If so, then we will provide an end-to-end service which includes establishment, implementation, administration, management, taxation, compliance, investment, and life insurance for your fund. Investment Accounting Services Pty Ltd will prepare and lodge the SMSF tax returns.

Investment Strategists SMSF Advice

If you choose to manage your own fund, it is important you understand the responsibilities placed upon you, the trustees of regulated funds today. We understand the complexities of the current and forever changing superannuation legislation and offer specialist advice and assistance in this area, carefully guiding you to a successful SMSF strategy.

Self-Managed Super Fund Administration & Reporting Services

We provide comprehensive ongoing administration services to you through our internal administration system and software. You will have on line access 24/7 where you can view a simple portfolio valuation updated daily or many more comprehensive and detailed reports are at your fingertips.

SPAA Specialists Advisers

Pauline Hammer, Anna Garuccio and Amanda Brain are distinguished as reputable specialists SMSF Advisors within the financial services industry. Our Advisers have achieved the highest possible level of education and experience required by the SPAA Accreditation Council for admission as a Specialists Member of SPAA.

ASX Accredited Listed Product Advisers

As an "Australian Stock Exchange (ASX) Accredited Listed Product Adviser", our Advisers are authorised to provide advice on listed shares and securities on the Australian Stock Exchange based on recommendations from independent research.

