



JPR Super Pty Ltd

Our Process

The process is summarised in 6 steps:

Introduction to advice;

- Why things are different from 1 July 2016
- Our licencing requirements through SMSF Advisers Network Pty Ltd
- Providing the Financial Services Guide (FSG) to the client

Identify the client's situation and objectives;

- Collect the relevant information
- Fact Finder required

Determine and document the strategy;

- Supporting information
- File notes

Present and proceed with advice;

- Statement of Advice (SOA) required

Manage the implementation process;

- Steps to implement the strategy
- Who will assist with the strategy? – i.e. the Accounting firm

Review ongoing recommendations;

- Is any ongoing advice required?

