

Please refer to *SuperGuide* article
SMSF Investment Strategy Health Checklist
for explanatory notes about this checklist.



SMSF Investment Strategy Health Checklist

1. Is it comprehensive enough?

☐ Yes

☐ No, needs work

2. Is it up to date and do you review it regularly?

☐ Yes

☐ No, need to schedule regular reviews

3. Is the asset allocation still appropriate?

☐ Yes

☐ No, may need adjusting

4. Do you need to rebalance?

☐ No, my asset allocation is OK

☐ Yes, it is out of whack

5. Are all investments allowed under your fund's trust deed?

☐ Yes

☐ No, need to amend trust deed

6. How long since you considered insurance needs of members?

☐ Recently

☐ Not recently

7. Have you minuted any changes?

☐ Yes

☐ No, need to do

8. Is it filed appropriately

☐ Yes

☐ No, not really