

SMSF annual admin checklist

1 Review investment strategy and document it

Completed

2 Hold regular trustee meetings and keep trustee minutes

Date completed: Completed

Date completed: Completed

Date completed: Completed

Date completed: Completed

3 Keep all documents for the required timeframe

Date completed:

4 Do the accounts and prepare annual return

Assets valued

Accounts completed

Annual returns lodged

Levy paid

5 Appoint an auditor

Appointed

6 Get an actuarial certificate if required

Completed

7 Appointing a fund administrator/accountant or auditor

Completed

8 Make minimum pension payments for the year

Completed