

## SMSF investment strategy health checklist

For explanatory notes, see:

<https://www.superguide.com.au/smsfs/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