

Superannuation Insight:

Don't bequeath your super to the ATO

Who would you prefer your leftover super to go to?



If you were to die before you've had a chance to spend all your super, who would you prefer to receive what's left over? Your loved ones or the ATO?

Many super accounts include a taxable component. So before it's transferred to your beneficiaries, it may be taxed. Unless, that is, you can take advantage of the re-contribution strategy. This involves withdrawing the taxable component from your super and then re-contributing it as non-taxable contributions. This strategy has saved some clients tens of thousands of dollars. But it's not a no-brainer. Whether and when you're eligible, the amount you can re-contribute and the way you do it, all require a great deal of technical expertise. That's where we come in.

Professional advice. Quite possibly the most valuable investment you'll ever make.



Call us today on (07) 5593 0855.

Wald Planning
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