

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.

Wealth Planning
PARTNERS

WPP Licensee Services Pty Ltd AFSL No. 530393 ABN 76 649 079 998. The information (including taxation) provided in this document is general information only and does not constitute personal advice. It has been prepared without taking into account any of your individual objectives, financial solutions, or needs. Before acting on this information you should consider its appropriateness, having regard to your own objectives, financial situation, and needs. You should read the relevant Product Disclosure Statements and seek personal advice from a qualified financial adviser.