



Concierge Administration Services

Let us take control of all administration responsibilities for your Investment Portfolio or SMSF.

The downside of actively growing your personal wealth is the administration involved with your finances and investments.

Using a professional administration service to manage your portfolio is an easy alternative for busy professionals and business owners who struggle to find the time to correctly execute their affairs. Our concierge administration services provide crucial support to ensure smooth running and ease of mind that your portfolio together with the burden of the paperwork has been taken care of.

The service entails all aspects of the day-to-day operation of your personal wealth and provides you with peace of mind that everything is taken care of.

The core benefits of our Concierge Administration services are:

- **Freedom** – The burden of paperwork required for the operation of an SMSF is extensive.
- **Time saved** – Let an expert do the compliance and administration work for you.
- **Flexibility** – As your requirements are likely to change over time we can evolve this service based on your needs.
- **Profit** – From our experience, you are likely to see a greater return on your investment as you will have better transparency in relation to your fund and can focus on your investments rather than the administration.
- **Access** – Our team have the technical expertise and modern computer technologies so that you have greater visibility over your fund.
- **Peace of mind** – Reduce your compliance liability risk.

How we can help you

Concierge Portfolio Service

Using a professional administration service to manage your portfolio is crucial to ensure smooth running and ease of mind that your portfolio together with the burden of the paperwork has been taken care of. The service entails all aspects of the day-to-day operation.

SMSF Concierge Service

We offer a specialist SMSF service tailored to your needs. Our role is to essentially take over all of the onerous administration and compliance services to you. The often understated side of SMSF's is the sheer amount of work involved in the day-to-day operation of the fund.

Concierge Administrative Service

Our Ongoing Service will provide you with access to our services throughout the year which includes but is not limited to Online access, reporting, accounts receivable and payable.

Interested in talking to us?

Please contact one of our financial advisers to organise a complimentary consultation to discuss your concierge administration needs.



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