

SMSF Research Information

Planners Name:

Clients Objective:

	Members / Contributors Names	Occupation	Age
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Proposed Property Investment Residential Commercial
 Estimated Price Range \$ to \$
 Postcodes of proposed property

BALANCE OF SMSF \$

SMSF - INCOME

Annual Contributions Below Concessional \$
 Annual Contributions Above Concessional \$

Income from - Other SMSF Investments \$

Income from - **New SMSF Investment Property** \$
 Income from - High Density Residential Property \$
 Income from - Commercial Investment Property \$

SMSF – EXPENSES

Annual repayments of other loans \$
 Current limits of other loans \$
 Current balances of other loans \$
 Annual SMSF running expenses and audit fees \$

Liquidity of SMSF after purchase – Total SMSF Assets, Cash and Shares