



Self Managed Superannuation Fund Advice

Why Merit Wealth?

Merit Wealth is a boutique Australian Financial Services Licensed company that bridges the gap between you, your accountant, and financial services professionals.

In 2016, the laws governing Self Managed Superannuation Fund (SMSF) advice changed. Accountants now need to be licensed to talk to and advise clients about SMSFs.

Established in 2010, today Merit Wealth has SMSF advisers across Australia. So, if you are looking for SMSF advice, an experienced and qualified Merit Wealth limited adviser can help.

Self Managed Superannuation Funds

Many Australians take control of their retirement savings by choosing a Self Managed Superannuation Fund. As experts in self managed superannuation, a Merit Wealth limited adviser can help you decide if a SMSF is right for you.

Limited SMSF Advice

A Merit Wealth limited adviser is authorised to provide advice on:

- Should I have a SMSF?
- Contributions
- Withdrawals
- Pensions

Further Advice

A Merit Wealth limited adviser has access to the broader Merit Wealth adviser network to provide further advice on:

- Rolling over superannuation
- Investment Strategies
- Investment Portfolio Construction
- Insurances

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