

# The Next Step



## **1. Make an appointment to see an InvestorOne advisor.**

It is important that you get the right advice when establishing a self managed superfund and rolling over your current superannuation. An InvestorOne advisor will be able to assess your circumstances and give you the right advice.

## **2. Complete the InvestorOne Client Questionnaire**

So that InvestorOne can prepare an appropriate Statement of Advice we need certain financial and other information from you. The Client Questionnaire serves to collect the information required to give you proper and complete advice.

## **3. Receive and approve your Statement of Advice**

InvestorOne prepares for every client a Statement of Advice that takes into their personal and financial circumstances and gives them clear direction of where they should be moving to achieve their financial goals.

## **4. Establish Self Managed Superfund and Borrowing Structure**

After you approve the recommendations in your Statement of Advice we establish the self managed superfund, apply for ATO approval and establish a bare trust to hold the property.

## **5. Rollover your existing super and direct employer contributions to new self managed fund**

We assist in rolling over your existing superannuation balance and advising your employer to pay your super into your new self managed superfund.

## **6. Select a Property**

After your funds have been rolled over you can go out and select a property to purchase.

## **7. Organise the Loan**

When a property has been selected and a deposit paid the loan needs to be organised from a bank.

## **8. Settle on the Property**

With the bank loan approved all that's left is to settle on the property.

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