

# Supervision SMSF

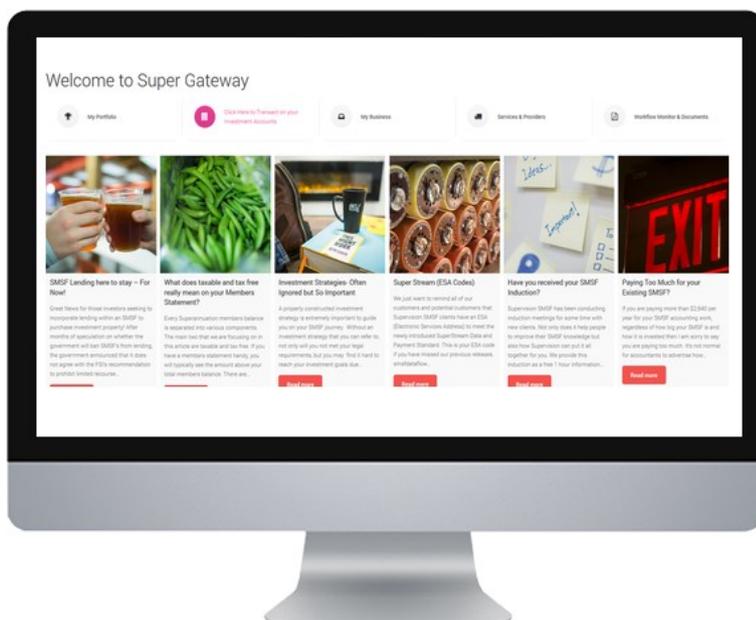
## Guide to Super Gateway

Jan 2016

# Welcome

Welcome to Super Gateway. We hope using Super Gateway will help you to stay in touch with your Super which will lead to better financial outcomes.

## Super Gateway



### What is it?

SMSF's have many moving parts. You will have at the very least a Bank Account, Online Broking Account, Term Deposit Platform and also your Online Portfolio. You may also choose to add a managed share account, share research tool and other add-on's from preferred suppliers. The aim of Super Gateway is to provide you with links to these providers and your portfolio in one place. We do this by providing Icons that correspond with various actions that you want to undertake. For example, we have an icon called "My Portfolio", when selected will display all the SMSF accounting and financial information of your SMSF in the one screen.

### How to gain Access to Super Gateway?

Super Gateway does not require passwords to enter. You can enter Super Gateway by clicking on the "Super Gateway" link on the Supervision website [www.supervision.com.au](http://www.supervision.com.au).



## What should I see there?

Once you have clicked on the Super Gateway link, you will land on a page that has a number of articles and a series of icons on the top row.



### “My Portfolio”

When you click on this link you will be taken to your online portfolio. This is your view of your SMSF records. All of your banking transactions, investments, contributions, pensions and performance is in this place. To gain access, please call us now and we can establish this together in 5 minutes. All you need is your computer and your email. You can maintain your password for “My Portfolio” at any time and request a password refresh if you forget it.

“My Portfolio” has a large array of information about your SMSF or Non SMSF assets at your disposal, too much to explain in this document. You may notice layout changes and new data features added all the time. Our experience tells us that most clients view a particular area and don't venture too far off the beaten track. That is OK, just remember that exploration is free and you will never know what is available unless you apply a curious mind.

### Here are some of the “Most Loved” Features

#### Bank Accounts

You can view all of your banking transactions line by line just like you can on your bank statement. It also shows you how that transaction has been coded by our team of professionals. If you have multiple bank accounts you can view them all in this section.

#### Contribution Caps

To avoid going over the contribution caps or just checking that your contributions are reaching your bank account, this section has all the information you could dream of. It breaks down contributions by members and creates a living cap calculator which tells you how much you can contribute. This is extremely important when you want to plan salary sacrifice or personal concessional contributions.

#### Pensions

If your SMSF is providing you with a pension, you need to make sure you take out enough to meet your minimum requirements. “My Portfolio” makes that simple by calculating pensions taken for each member and telling you how much is left to draw.

## Investment Valuation

In order to make sure that your SMSF is headed in the right direction, this section provides all the information you need to track your SMSF investments. The advantage of this system is that all holdings are available so that you have a total view of your SMSF valuation- not just a snapshot of a particular investment class that is held on one platform. With updated prices for listed investments, you are always in control of your total market value.

Includes cash, Managed investments, listed shares, Property, everything in your SMSF.

## Unrealised Capital Gains

Our report breaks down every share into their purchase parcels and gives you an up to date capital gain or loss position. This is extremely handy when you are looking to rebalance your portfolio. You know exactly how much profit or loss each parcel has before taking action.

## Performance Report

The performance report outlines total return values & total return as a percentage for every holding in your portfolio. In addition there is a time weighted average comparison to major indices to see how your SMSF compares.

## Fund Reports

All of your historical accounting information is stored in this section. Download your P & L, Balance Sheet, Members Statements from any period and receive the reports instantly when you want them.



## “Invest & Transact”

This icon is where you will find all of the links to your transactional accounts. These are the working parts of your SMSF. Entering Invest & Transact you will give you access to links such as “Banking”, “Listed Securities”, “Term Deposits”, “Property”, “Managed Portfolio’s”, “Insurance”, “Finance Broking”, “Share Market Research”, “Bonds” and many more. This is where the rubber hits the road and you can buy and sell shares, get a term deposit, purchase insurance and view the next property for your portfolio. This section is expected to grow and give you more options. You should have already been sent your login details for these third party suppliers. If you haven’t got these details please call us to day and we will arrange it. From this page you will be able to work get almost everything done.



### **“My Business”**

Supervision has provided a link to Xero so that if you want to complete your business transactions online you can go there and start using it. You can do all of your small business accounts on the move using Xero. Xero is our current preferred partner for business and personal accounting.



### **“Services & Providers”**

This section showcases all of the providers that we provide on our approved suppliers list. This list includes all of the financial providers as well as the service providers that an SMSF may need. We have included information about how they actually work with videos and contact details for your convenience. Our aim is for you to get the information you need for your SMSF in one place without leaving the Supervision website. This list is set to grow, so to learn more about our providers, please feel free to look through each company in this section to see how they could help your SMSF.



### **“Workflow Monitor & Documents”**

Supervision holds your documents securely in electronic format. We also have a sophisticated workflow monitoring system that helps us track the work on your SMSF. If you want to view all of the jobs on your SMSF or any other business entity and then download documents, then you can do so here. You can gain access by calling us and establishing an account.

## Why Use Super Gateway?

Super Gateway brings you to our website to interact with your SMSF. It is the central hub where you can view your portfolio, read our latest blog article and also complete transactions. While you are in our website, we can also use the “knowledge library” to get more technical information about what you can or can’t do. We want Super Gateway to be the “one stop shop” for all your SMSF needs. But what you see now will change and evolve as you would expect. We will upgrade and add on to the current list of providers, articles, services and so much more, so please don’t think you have seen it all, because we aim to surprise.

## Lost & Forgotten Passwords

All third party suppliers like your online banking facilities and online broker will supply usernames and passwords independently of Supervision SMSF. This means that Supervision SMSF does not have any control over your trading accounts and does not store or have access to your usernames and passwords. The advantage is that you are able to receive notification of a lost password when our offices are closed.

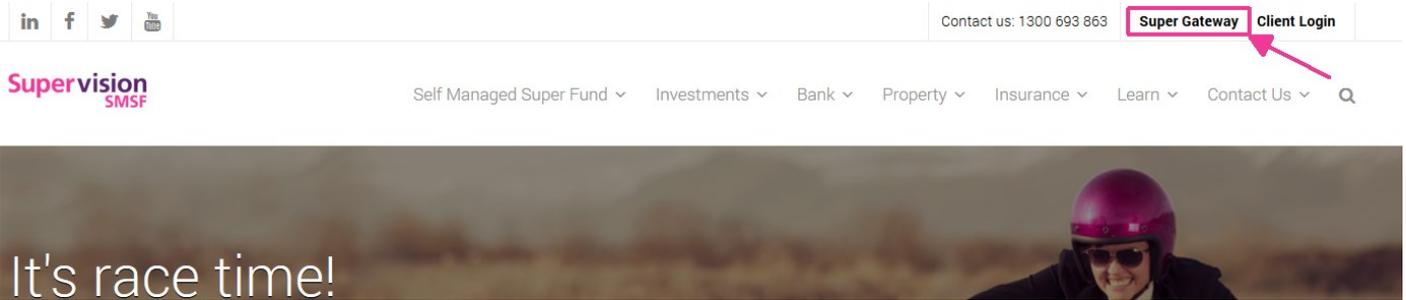
## Is Super Gateway safe?

Super Gateway is a page on our website. We do not store your usernames or passwords for your online trading accounts on our website or in our databases. You are always in control over your usernames and passwords. It is advisable to take IT precautions that reduce the likelihood of stolen usernames and passwords as you would with any other online facilities. Changing passwords regularly and updating spyware and virus protection is always advisable.

- **Visit Super Gateway today - [www.supervision.com.au](http://www.supervision.com.au)**
- **Book your induction meeting.**

# Where can I find Super Gateway?

go to: [www.supervision.com.au](http://www.supervision.com.au) , click <Super Gateway>



## What will I see?

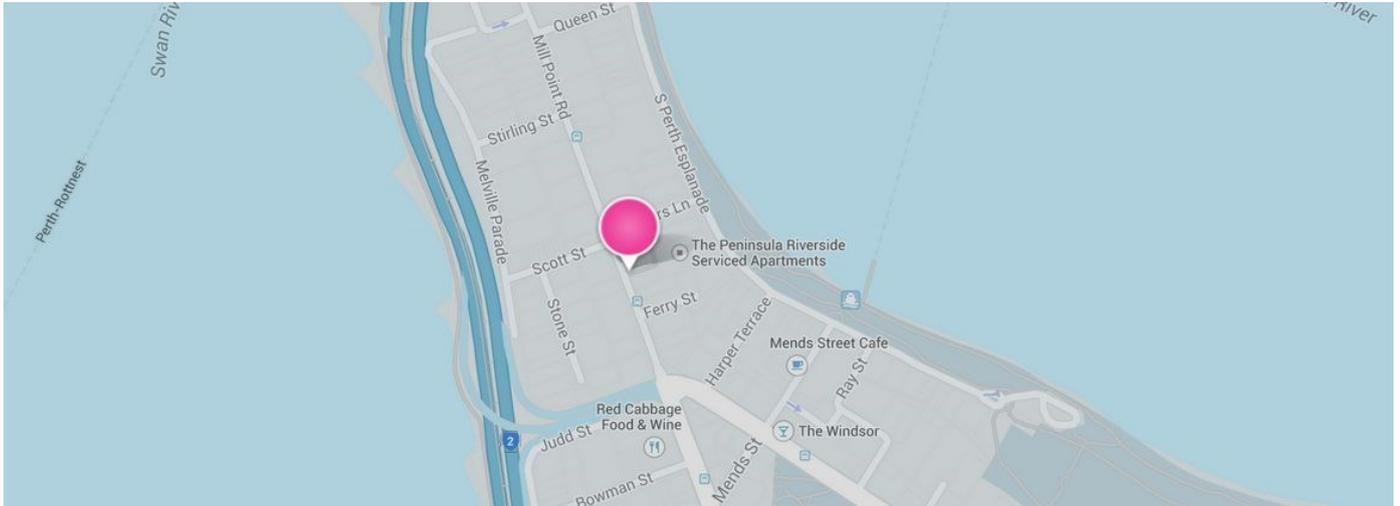
Welcome to Super Gateway



 <p><b>SMSF Lending here to stay – For Now!</b></p> <p>Great News for those investors seeking to incorporate lending within an SMSF to purchase investment property! After months of speculation on whether the government will ban SMSF's from lending, the government announced that it does not agree with the FSI's recommendation to prohibit limited recourse...</p> <p><a href="#">Read more</a></p>	 <p><b>What does taxable and tax free really mean on your Members Statement?</b></p> <p>Every Superannuation members balance is separated into various components. The main two that we are focusing on in this article are taxable and tax free. If you have a members statement handy, you will typically see the amount above your total members balance. There are...</p> <p><a href="#">Read more</a></p>	 <p><b>Investment Strategies- Often Ignored but So Important</b></p> <p>A properly constructed investment strategy is extremely important to guide you on your SMSF journey. Without an investment strategy that you can refer to, not only will you not meet your legal requirements, but you may find it hard to reach your investment goals due...</p> <p><a href="#">Read more</a></p>	 <p><b>Super Stream (ESA Codes)</b></p> <p>We just want to remind all of our customers and potential customers that Supervision SMSF clients have an ESA (Electronic Services Address) to meet the newly introduced SuperStream Data and Payment Standard. This is your ESA code if you have missed our previous releases. <a href="#">smaddataflow</a>.</p> <p><a href="#">Read more</a></p>	 <p><b>Have you received your SMSF Induction?</b></p> <p>Supervision SMSF has been conducting induction meetings for some time with new clients. Not only does it help people to improve their SMSF knowledge but also how Supervision can put it all together for you. We provide this induction as a free 1 hour information...</p> <p><a href="#">Read more</a></p>	 <p><b>Paying Too Much for your Existing SMSF?</b></p> <p>If you are paying more than \$2,640 per year for your SMSF accounting work, regardless of how big your SMSF is and how it is invested then I am sorry to say you are paying too much. It's not normal for accountants to advertise how...</p> <p><a href="#">Read more</a></p>
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# Contact Us

## Office Map



## Contact Number

**1300 693 863**

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## Office Address

**Physical Address: Level 2, 76 Mill Point Road, South Perth, WA, 6151**

**Postal Address: PO Box 879, South Perth, WA, 6951**

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## Email Address

**New enquiries email: [info@supervision.com.au](mailto:info@supervision.com.au)**

**Mail email: [mail@supervision.com.au](mailto:mail@supervision.com.au)**

**Accounts email: [accounts@supervision.com.au](mailto:accounts@supervision.com.au)**

**Blog replies: [hello@supervision.com.au](mailto:hello@supervision.com.au)**

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## Corporate Directory

**Supervision Superannuation (Australia) Pty Ltd (ABN: 54 105 828 117)**

**Supervision SMSF Solutions Pty Ltd (ABN: 47 134 666 596) AFSL: 435751**

