

## SMSF investment strategy health checklist

**1 Is it comprehensive enough?**

☐ Yes

☐ No, needs work

**2 Is it up to date and do you review it regularly?**

☐ Yes

☐ No, need to schedule regular reviews

**3 Is the asset allocation still appropriate?**

☐ Yes

☐ No, may need adjusting

**4 Do you need to rebalance?**

☐ No, my asset allocation is OK

☐ Yes, it is out of whack

**5 Are all investments allowed under your fund's trust deed?**

☐ Yes

☐ No, need to amend trust deed

**6 How long since you considered insurance needs of members?**

☐ Recently

☐ Not recently

**7 Have you minuted any changes?**

☐ Yes

☐ No, need to do

**8 Is it filed appropriately?**

☐ Yes

☐ No, not really