

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