

Switching your SMSF to us

Now you can focus on your SMSF performance and leave the admin burden to us. In association with premium SMSF Administrator, ExpertSuper, we have created an affordable all-in one SMSF solution. This premium services includes everything you need for the tax, compliance and admin.

Bell Direct SMSF service providers



National SMSF admin specialists. They provide compliance, admin, tax and strategic SMSF advice.



Cloud based accounting software used by ExpertSuper to provide financial statements, tax service and daily online reports.



Award winning independent SMSF auditor with over 15 years' experience engaged by ExpertSuper to provide the annual independent audit.



Leading insurers who offer life and income protection insurance at competitive wholesale rates.



Your award-winning trading and investing platform.

Switching your SMSF to us: 5 easy steps

TELL US ABOUT YOU

1



After you've entered your contact details, we'll call you to explain the process.



You'll fill out our online form to give us the go-ahead.

WE'LL SET UP YOUR SMSF

2

Transfer

EXISTING

SMSF

We'll transfer your existing SMSF and set up your Bell Direct trading account.



You'll receive our SMSF Welcome Pack.



TOGETHER WE'LL TAKE CARE OF THE PAPERWORK

3



Sign and return all the documents to us.



If you don't already have a Macquarie bank account, you'll receive an application to open one for your SMSF.

YOUR ACCOUNTS WILL BE ACTIVATED

4



You'll get login details for all your newly activated accounts.



After your first transaction, we'll send you a letter with access to your fund documents and any outstanding fees.



You'll get access to your SMSF online reporting to track your performance.

START INVESTING

5



Deposit funds in your Bell Direct trading account and start investing.