

Setting up your SMSF with Rivkin

Step-by-step guide for new clients (timeframe approx 10 - 15 days)

STEP 1

Form Completion

Complete a simple online application to begin.

STEP 2

SMSF Establishment

Rivkin establishes your SMSF, including the corporate trustee structure.

STEP 3

ATO Registration

Your fund is registered with the ATO. ABN and TFN applications are lodged.

STEP 4

Documentation Delivered

Receive your establishment pack with all key records, signing documents, and next steps.

STEP 5

Bank Account Set Up

Rivkin establishes a SMSF Macquarie Cash Management Account for contributions, rollovers and investments.

STEP 6

Super Rollover

Rivkin manages the rollover process from your existing super funds into the SMSF