

BG Private Super

Superannuation Specialist Service

Superannuation has become one of the most important considerations for our retirement planning.

Superannuation enjoys significant tax concessions and provides a vehicle to create and consolidate wealth in retirement, or to distribute wealth to the next generation.

As a result, taking advantage of Self Managed Superannuation Funds (SMSFs) has become an integral part of the retirement plan.

However, the compliance and auditing aspects of maintaining SMSF's have become increasingly complex, and extensive professional knowledge is required to ensure that you comply with all relevant superannuation legislation, including the Superannuation Industry (Supervision) Act 1993 and the latest Auditing Standards.



For these reasons, Banks Group has established a specialised superannuation team, BG Private Super, with access to a separate auditing company, to cater for SMSF compliance and auditing.

Our dedicated superannuation team members have had many years of experience in SMSF's, and plenty of practical experience across the superannuation spectrum.

Our independent auditing company is highly qualified and currently audits all of Banks Group's Self Managed Superannuation Funds.

The SMSF compliance team currently oversees a large number of funds, and can provide a broad range of specialised services, including:

- Establishment and administration of all types of pensions
- SMSF administration services, involving the collection of data such as investment reports, dividends and tax statements, and dealing with ATO correspondence
- Preparation of year end financial reports and member statements
- Preparation and lodgement of Income Tax Returns
- Preparation of ATO Regulatory Returns
- Preparation of Member Contribution Statements
- Review of Trust Deed and statutory documents
- Audit of Self Managed Superannuation Funds

With the extensive experience of our Superannuation personnel and the efficiency created by a dedicated team, we are confident that we can assist you with all of your SMSF related matters.

Key contacts



Hanh On | Partner

Hanh is a Partner at Banks Group who has been assisting clients for over 20 years across accounting, financial planning and self-managed superannuation. He has managed the specialist Superannuation Division at Banks Group since establishing the division in 2004 to ensure the most comprehensive and professional management of all superannuation compliance and SMSF auditing requirements.

Hanh is highly skilled across multiple disciplines. This means he provides a comprehensive service for clients, ensuring financial planning and superannuation issues are expertly handled as part of their overall financial wellbeing.

Hanh understands that his clients work exceptionally hard to build their wealth and feels privileged to be able to help people create the life they want and provide for their families. He works hard to deliver a highly personalised service, tailored to each client and their specific circumstances no matter where they are in their financial journey.



Rocky Sorrenti | Partner

Rocky is a Partner at Banks Group and is in charge of financial planning.

He has more than 30 years of experience in the provision of taxation and financial planning advice. This includes four years at the Australian Taxation Office and five years as a Senior Taxation Consultant at Price Waterhouse.

After establishing his own successful accounting firm in 1992, Rocky merged with Banks Group in 2007. This enabled him to focus on financial planning while remaining confident his clients would continue to receive the highest quality accounting advice.

“Life is full of unknowns. We can’t be certain of future earnings, interest rates, government policies and even our own health. However, I can guarantee one thing – those who put a financial plan in place will have a lot more money when they come to retire than those who never get around to it,” says Rocky.

About Banks Group | At Banks Group we offer a highly valued accounting and advisory service that encompasses tax strategies, audit, forecasting, financial planning and funds management. Our top performing staff are well equipped to handle your business growth and changing needs. We understand the drivers that secure profit for your business.

Whether you are a large or small client, we combine technical knowledge with hands-on experience to impact your bottom line. Banks Group is at the forefront of the ever-changing accountancy landscape and its current client list represents some of the most exciting businesses and industries in Australia.

If you have any further questions, please do not hesitate to contact:



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