SMSF PRACTICE OF THE YEAR

AWARD SUMMARY

This award recognises a practice that has demonstrated exceptional performance in the specialised field of self-managed superannuation funds. SMSF work demands a distinct level of technical expertise, regulatory knowledge,and compliance rigour that sets it apart from broader financial advice, spanning fund establishment, administration, audit and ongoing trustee support. The winning practice will have set a benchmark for excellence in SMSF service delivery, client outcomes, and ethical and professional standards.

The winning practice will have demonstrated:

- Deep technical expertise in SMSF establishment, administration, and compliance.
- A strong commitment to trustee education and client support.
- Ethical standards and rigorous adherence to superannuation regulation.

ELIGIBILITY

This award is open to all SMSF practices operating in Australia during the 2025/2026 calendar year. Practices can self-nominate or be nominated by others. Open to practices whose core service offering is SMSF establishment, administration, audit, or advice.

Revenue threshold: At least 50% of the practice's revenue must be derived from SMSF-related services, or the practice administers a minimum of 50 SMSFs.

ASSESSMENT CRITERIA

Open to practices whose core service offering is SMSF establishment, administration, audit, or advice. Revenue threshold: At least 50% of the practice's revenue must be derived from SMSF related services, or the practice administers a minimum of 50 SMSFs. Submissions will be evaluated based on responses to the following criteria, with a maximum of 300 words.

- **Client Satisfaction and Growth**: Evidence client satisfaction through testimonials and retention/growth metrics.
- **Innovative Client Services**: Describe innovative services or strategies implemented.
- **Ethical and Professional Standards**: Outline the practice's commitment to high ethical standards and professional development initiatives.
- **Community and Industry Contribution**: Provide details of active industry engagement and community contributions.

BUSINESS METRICS

Please provide the following business metrics:

- Total practice revenue
- Client growth percentages
- Client retention rates

Candidates are encouraged to provide specific examples, metrics and supporting documentation where applicable such as testimonials or endorsements from clients, industry peers or community organisations.

Submit a Nomination or Nominate Yourself!