SMSF OVERVIEW

- Over the five years to 2017, there were an average 34,000 new SMSFs established each year.
- 19% increase in the number of SMSFs and over 46% increase in SMSF assets.

ASSETS

Top five assets held by SMSFs in 2016 (by value):
- Listed shares: 30%
- Cash and term deposits: 25%
- Non-residential real property: 10%
- Unlisted trusts: 10%
- Other managed investments: 5%

These make up 80% of all SMSF assets.

SMSFs have achieved positive returns for the past five years to 2016.

Estimated return on assets in 2015–16: 2.9%

82% of SMSFs hold assets greater than $200,000.

INS & OUTS

SMSF contributions:

- $32.3 billion in 2016
- Increased by 21% over the five year period

SMSF benefit payments:

- $37 billion in 2016
- Increased by 64% over the five year period

LETS TALK ABOUT SMSFs AND THEIR MEMBERS

- Over the five years to 2016, there was a shift of SMSFs moving into the pension phase (4%).
- Majority of SMSFs at June 2017 have a corporate trustee.
- Median age of all SMSF members as at June 2017 was 59 years. Median age of members of newly established funds in 2016 was 47 years.

- As at June 2017
  - 53% Accumulation
  - 47% Pension

- Female
  - 47%

- Male
  - 53%

- 25% 26% / 25% 26%