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SMSF Insurance from 1 July 2014

From 1 July 2014, an SMSF is restricted to only acquiring insurance policies for its members that are aligned with a SIS Regulation “condition of release”, those being:

- Death;
- Permanent incapacity;
- Temporary incapacity;
- Terminal medical condition.

Any insurance policies that were acquired by an SMSF prior to 1 July 2014 that do not align with the new rules will be grandfathered to enable the SMSF to continue to hold these policies. For any applicable grandfathered policies, the member may also vary their level of cover, however great care should be taken and specialist advice sought prior to any adjustments to a pre-1 July 2014 policy.

A TSG representative will be able to provide you with an insurance policy that is compliant with these new rules, for a quote or further information please contact us on (02) 9328 9328.

The Super Group

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