

Self-managed super funds

Annual statistics overview 2020-21

SMSF OVERVIEW

Establishments and wind-ups each year In the five years to 24.000 15,000 30 June 2022, the number of SMSFs **grew** by **8%** and SMSF assets grew by 33%

2021-22 on average Establishments of new SMSFs have increased 9% from 25,000 to 28,000 in the 5 years to 30 June 2022 SMSFs make up 26% of all **super assets** at 30 June \$

ASSETS

YEARS >10 >5-10 >3-5 of SMSFs have >2-3 existed for more than 10 years >1-2 <1 10 years +

Services used to meet SMSF tax and regulatory obligations in 2020-21 SMSF auditors

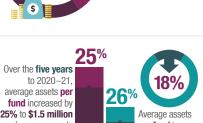
Tax agents

13,800

3.900

The top five assets held by SMSFs





and average assets per fund in year per member of establishment increased by 26% have decreased by to **\$791,000** 18% to \$399,000

SMSFs achieved positive returns for the past five years

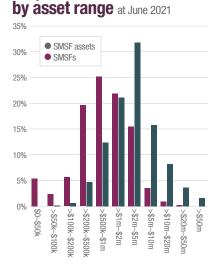


In 2020–21,12% of members had an SMSF closing account balance over up **4%** from 2016–17

There was a 3% change in SMSF assets in retirement and accumulation phases from 2019-20 to 2020-21 65%



Proportion of SMSFs

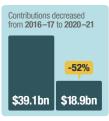


INS & OUTS

SMSF contributions

2020-21







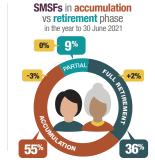
SMSF benefit payments \$31.4 billion





2019-20 to 2020-21 2016-17 to 2020-21





LET'S TALK ABOUT SMSFS AND THEIR MEMBERS

Corporate vs **individual** trustees





