

This month's newsletter begins with information on several key retirement trends highlighted within the recent 2021 HILDA Survey. We have an animation illustrating small business CGT concessions, which could help those eligible manage an associated capital gain—and boost their retirement savings. We provide an overview of SMSF trustee responsibility, eligibility, and structure types—at 30 June 2021, there were over 598,000 SMSFs and over 1.115 million members of SMSFs. We explain commonly used jargon in the personal insurance space—understanding finance jargon can help with making informed personal finance decisions. We also share a recent ABC News video where Alan Kohler discusses his thoughts on the RBA Board and the cash rate, coupled with several considerations regarding home loans and lending interest rates.

Lastly, Vanessa Stoykov's latest financial education piece shares five simple questions worth asking yourself that could very well save you thousands of dollars—and, in turn, help you to save for a better future.

The 2021 HILDA Survey: Retirement trends

The Household, Income and Labour Dynamics in Australia (HILDA) Survey collects information on many aspects of life. In this article, we explore retirement trends highlighted in the 2021 HILDA Survey.

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Small business CGT concessions

If considering the sale of business assets, you may be eligible for CGT concessions, which could help with any associated capital gain. In this animation, we illustrate small business CGT concessions.

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SMSFs: Individual trustee vs. corporate trustee

At 30 June 2021, 65% of all SMSFs had a corporate trustee structure—instead of individual trustee. In this article, we discuss SMSF trustee responsibility, eligibility, and structure types.

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Jargon buster: Personal insurance edition

In the finance industry, there can be a considerable amount of jargon. In this article, we help clarify some of the commonly used jargon within the personal insurance space.

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ABC News: Home loans and interest rate considerations

On 1 February 2022, the RBA made the decision to maintain the cash rate target at 10 basis points. In this ABC News video, Alan Kohler discusses his thoughts on home loans and interest rates.

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Vanessa Stoykov: 5 questions that could save you thousands







Vanessa Stoykov is a renowned Australian money educator. In this special financial education piece, Vanessa shares five simple questions worth asking yourself that could very well save you thousands.

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