

Appendix 3

Additional information, tabled documents, and answers to questions on notice

Additional Information

Association of Financial Advisers

Member survey regarding fee charges and value for clients when working with financial advisers

Australian Taxation Office

DIY Super – It's your money...but not yet! Explains the ATO's position on self managed superannuation funds, July 2004

Role and responsibilities of trustees, November 2005

Association of Independent Retirees (AIR) Ltd

Detailed Report on National Survey of Members, 30 October 2006

CPA Australia

Financial Advisory Services Research Report – Self Managed Super Funds, October 2004

Guidance Note for Advising on SMSFs, Guidance for CPA Public Practitioners, October 2006

A Plan to Simplify and Streamline Superannuation, 7 August 2006

Pre-Budget Submission 2007-08, November 2006

Financial Planning Association of Australia

Submission to Treasury, Proposals Paper, Corporate and Financial Services Regulation Review, 25 January 2007

Investment and Financial Services Association Ltd

Investment Trends/ IFSA Self Managed Super Funds, February 2006

Submission to Government on definitions of advice, 29 May 2006

Personal versus General Advice (Item 1.17 of the Corporate and Financial Services Review), draft submission to Treasury, September 2006

Self Managed Super Fund Professionals' Association of Australia Ltd

Self-managed superannuation fund statistics, 4 April 2007

Self-managed superannuation fund updated statistics, 30 July 2007

Superannuation Complaints Tribunal

...how it can help you, booklet, June 2005

Letter to The Hon Mal Brough MP, Aboriginal CDEP Policy, 15 February 2006

Letter to Hon Joe Hockey MP, Aboriginal CDEP Policy, 24 January 2007

Letter to Committee explaining difficulties members may experience when trying to understand benefits and exit fees, 28 March 2007

Letter to Hon Joe Hockey MP, Aboriginal CDEP Policy, 14 August 2006

Unisuper

Article, Approach to member education and advice, February 2007

Investing for the future – Your guide to investment choices in Unisuper, booklet, July 2006

Unisuper investment choice calculator, July 2006

Tabled documents

Industry Super Network, Response to Speech of Senator Chapman incorporated in Hansard – 1.56am, 24 June 2004, 6 March 2007

Financial Planning Association of Australia Ltd, *Why do clients need ongoing advice?*, 24 October 2007

Answers to questions on notice

Association of Superannuation Funds of Australia Ltd, 24 October 2006

Self Managed Super Fund Professionals' Association of Australia Ltd, 24 October 2006

REST Superannuation, 24 October 2006

Financial Planning Association, 24 October 2006

CPA Australia, 25 October 2006

Equisuper, 25 October 2006

Industry Funds Forum, 25 October 2006

Superpartners, 25 October 2006

Members Equity Bank, 25 October 2006

Mercer Human Resource Consulting, 25 October 2006

Australian Taxation Office, 20 November 2006

Department of the Treasury, 20 November 2006

Australian Securities and Investments Commission, 20 November 2006

Unisuper, 5 March 2007

ACTU, 5 March 2007

Trowbridge Deloitte, 7 March 2007

Australian Prudential Regulation Authority, 7 March 2007

