



SMSF Association
Accredited
Educator

10 SMSF Hours in One Day

Thursday, 26 November 2020

7.30am to 6.30pm AEDT

| Standard: \$795.00

Live Online or On Demand

You heard right, it's one HUGE day of SMSF critical updates, strategies and best practice. Where else can you claim a whopping 10 specialist SMSF hours in one go? Walk away with practical workshops on lump sum death benefit distributions, defined benefits and complex TBAR. Enhance your SMSF administration and get on top of your compliance obligations. Hear the latest contributions and pension strategies and unlock investment options. It's all there, all in one day, all straight from leading experts working day in and day out at the coalface of these crucial issues. Get the top legal and accounting advice you would otherwise pay thousands for at this comprehensive, convenient and practical conference.

HEAR FROM THESE EXPERT SPEAKERS



Mark Wilkinson
BDO



Peter Bobbin CTA
Coleman Greig



Steven Jell
Cooper Grace Ward



Julie Steed
Australian Executor
Trustees



Tracey Scotchbrook
Superology



Darren Chinnappa
Nexia Australia



Tracey Norris
Pitcher Partners



Dr Bill Orow
Barrister



Katie Timms
RSM Australia



David Busoli
SMSF Alliance



Matthew Richardson
Accurium



Sharon Gdanski
Deloitte



Michael O'Neill
Investors Mutual Ltd

10 SMSF Hours in One Day

SESSION 1: SMSF TECHNICAL WORKSHOPS

WEB2011AN03A

7.30AM TO 10.30AM AEDT

\$280

Chair: **Mark Wilkinson**, Partner, Superannuation, BDO; ICAA & CAANZ SMSF Specialist

Utilising Lump Sum Death Benefit Distributions to Avoid Risk and Maximise Results

It's easy to get it wrong and you only have one chance to get it right. Learn the advanced tips, tricks and strategies for planning for and managing the death benefit including:

- Key professional advisor risks
- Will drafting clashes
- Tax considerations and the be-ready steps
- The claims staking procedure that protects

Presented by **Peter Bobbin CTA**, Principal Lawyer, Coleman Greig; Preeminent Wills, Estates & Succession Planning Lawyer – NSW, *Doyle's Guide 2020*; Chair of Society of Trust and Estate Practitioners (STEP) Australia

Estimated 1 CPD hour in Technical Competence

Death Bed Superannuation Withdrawals: Problems and Pitfalls

Making a tax free superannuation member payment shortly prior to the death of a member can minimise the tax that would otherwise be payable on that member's superannuation death benefit. Understand:

- The practical issues when planning and implementing a member withdrawal shortly prior to death
- Proactive steps to take to optimise success

Presented by **Steven Jell**, Senior Associate, Cooper Grace Ward; SMSFA Specialist Adviser™

Estimated 1 CPD unit in Technical Competence

WORKSHOP

Defined Benefits and SMSF Complying Pensions Workshop

Advising clients with defined benefits or SMSF complying pensions is not an everyday occurrence for many practitioners. In addition, many of their workings are complex. Accordingly, it is easy for some of their features and interaction with 'normal' superannuation rules to be misunderstood.

Using case studies, review:

- Calculating the total super balance
- Calculating the transfer balance cap
- PAYG taxation of defined benefits

Presented by **Julie Steed**, Senior Technical Services Manager, Australian Executor Trustees; SMSFA Specialist Adviser™

Estimated 1 CPD hour in Technical Competence

SESSION 2: SMSFs AND REAL WORLD PRACTICE

WEB2011AN03B

10.45AM TO 1.45PM AEDT

\$280

Chair: **Tracey Scotchbrook**, Director, Superology; SMSF Specialist Adviser™

Optimised Administration of SMSFs Shared Between Accountants and Advisers: Who Should do What?

With accountants and advisers needing to work together to service SMSF clients, it is important to understand which specific services should be completed by who in order to deliver a holistic seamless service to the client. Some of the areas that will be dissected include:

- Establishments and Wind Ups
- Investment Strategy
- Contributions and Rollovers
- Pensions and lump sums including TBAR lodgments

Presented by **Darren Chinnappa**, Manager – Superannuation Division, Nexia Australia; CA SMSF Specialist

Estimated 1 CPD hour in Client Care and Practice

War Stories on Death Benefits, TBAR Reporting, Frozen Assets and Winding Up SMSFs

Work through real life case studies where things have gone wrong in recent death benefits, and examine practical issues that arise including:

- Determining the beneficiaries and documenting the trustee decisions regarding the death benefit payments
- Reporting the benefit for TBAR purposes (when and how)
- Trustee Succession issues and winding up the SMSF

Presented by **Tracey Norris**, Director – Superannuation Services, Pitcher Partners; CAANZ SMSF Specialist

Estimated 1 CPD hour in Technical Competence

SMSF Compliance Obligations: Legal Guidance to Ensure Trustee Compliance

- Statutory compliance obligations of trustees
- Liability of trustees and directors to prosecutions
- Breaches of the in-house assets, sole purpose and other statutory test/requirements

Presented by **Dr Bill Orow**, Barrister, Greens List

Estimated 1 CPD unit in Regulatory Compliance and Consumer Protection

SESSION 3: SMSF STRATEGIES AND ADVICE IN THE CURRENT CLIMATE

WEB2011AN03B

2.15PM TO 6.30PM AEDT

\$375

Chair: **Katie Timms**, National Director, Superannuation & SMSF Services, RSM Australia; SMSFA Specialist Adviser™

SMSF Pension Strategies and Transfer Balance Cap Issues: Exploring Complex Scenarios

- Calculating the TBA, including Total Super Balance, exclusions and breaches
- Optimising TBA with commutation and segregation
- Examine reversionary vs non-reversionary and commutation impact upon death

Presented by **David Busoli**, Practice Principal & SMSF Specialist Mentor, SMSF Alliance

Estimated 1 CPD unit in Technical Competence

Pension Funds and Capital Gains and Losses: A Guide to ECPI, Retaining Losses and Selling Assets

- Claiming exempt current income (ECPI)
- Total Super Balance and disregarded small fund assets
- Consider timing of transactions and how to retain capital losses
- Selling assets that utilised CGT relief

Presented by **Matthew Richardson**, SMSF Manager, Accurium; SMSFA Specialist Adviser™

Estimated 1 CPD unit in Technical Competence

Hot Topic! Latest on Contributions & Retirement Income Strategies

- Updates to Downsizer rules
- Increase in work test age
- Proposed changes to bring forward non concessional contributions
- Outcomes from the retirement income review
- 2019/2020 Unused concessional cap carry forward
- How to allocate income streams for maximum tax advantage

Presented by **Sharon Gdanski**, Director - Superannuation, Deloitte

Estimated 1 CPD unit in Technical Competence

PANEL DISCUSSION

The Latest Investment Strategies From the Top Investment Experts

Panellist include:

Michael O'Neill, Portfolio Manager, Investors Mutual Ltd; Adjunct Associate Professor Actuarial Sciences, Bond University

Darren Chinnappa, Manager – Superannuation Division, Nexia Australia; CA SMSF Specialist

Estimated 1 CPD unit in Technical Competence

10
HOURS

Attend the full day and earn 10 CPD hours

Estimated FASEA CPD Categories

1 CPD hour in Regulatory Compliance and Consumer Protection

1 CPD hour in Client Care and Practice

8 CPD hours in Technical Competence



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[Click here to view program online >>](#)

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3 SIMPLE WAYS TO REGISTER

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10 Hours too long?

Choose which sessions to do Live Online, and which to do On Demand, so you don't have to do it all in one go

*Tick your preferred delivery format per session in the table below; or if you register online, add each session separately to your cart, and the total will automatically take into account the 10 hours discount

Please register me for:

	Code	Std. fee	Live Online	On Demand
10 SMSF Hours in One Day click here to register online>>	WEB2011AN03	\$795.00	<input type="checkbox"/>	<input type="checkbox"/>
Session 1: SMSF Technical Workshops	WEB2011AN03A	\$280.00	<input type="checkbox"/>	<input type="checkbox"/>
Session 2: SMSFs and Real World Practice	WEB2011AN03B	\$280.00	<input type="checkbox"/>	<input type="checkbox"/>
Session 3: SMSF Strategies and Advice in the Current Climate	WEB2011AN03C	\$375.00	<input type="checkbox"/>	<input type="checkbox"/>

YOUR DETAILS

Title First name

Last name

Job title

Organisation

Email

Postal address

City State P/Code

Phone

ADDITIONAL DELEGATE

Title First name

Last name

Job title

Organisation

Email

Postal address

City State P/Code

Phone

PAYMENT

All prices incl GST. This document will be a tax invoice for GST when fully completed and you make a payment that is under \$1000. Please take a copy for your records. ALL registrations must be paid in full prior to the date of the event.

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Expiry Date / / CVV

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TERMS AND CONDITIONS

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BOOKING CODE: WEB2011AN03 WEB