

SMSF **Association** *National* *Conference* **2017**

Wednesday 15 to Friday 17 February 2017
Melbourne Convention & Exhibition Centre

CONFERENCE PROGRAM

Early Bird Member - \$1690

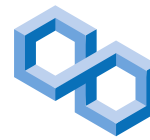
Standard - \$1980

Non-member - \$2570

Registrations open Monday 10 October
(Early Bird close Friday 2 December)



www.smsfassociation.com/conference



Day 1

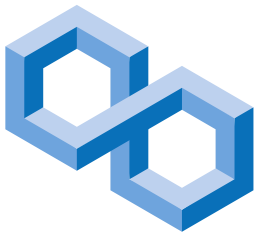
From 7:30am	EXHIBITION HALL OPEN <i>Exhibition Bays 11&12</i>				
8:00am	THOUGHT LEADERSHIP BREAKFAST PRESENTED BY VANGUARD INVESTMENTS <i>Meeting Rooms 212 & 213</i>				
	Can Super be trusted? Karen Chester, Deputy Chair, Australian Productivity Commission Helen Rowell, Deputy Chairman, Australian Prudential Regulation Andrea Slattery, Managing Director/CEO, SMSF Association Peter Williams, Chief Edge Officer, Centre for the Edge, Deloitte Australia				
8:30am	EVOLUTION: SMSF INVESTMENTS <i>Plenary 1</i> Industry evolution insights - SMSF Investments	EVOLUTION: SMSF TECHNOLOGY <i>Plenary 3</i> Industry evolution insights - SMSF Technology	YOUR EVOLUTION: SSA TUTORIAL <i>Meeting Room 219</i> Tutorial for the SSA exam Peter Hogan, Head of Technical, SMSF Association		
10:15am	OPENING ADDRESS <i>Plenary 2</i> Andrea Slattery, Managing Director/CEO, SMSF Association				
10:30am	Hear from Malcolm Turnbull (Video) <i>Plenary 2</i> Malcolm Turnbull, Prime Minister of Australia				
10:35am	PLENARY SESSION 1 <i>Plenary 2</i> Trust in uncertain times Tim Costello, CEO, World Vision Australia				
11:20am	PATRON ADDRESS <i>Plenary 2</i> Sir Anthony Mason, Patron, SMSF Association				
11:25am	PLENARY SESSION 2 <i>Plenary 2</i> Superannuation reforms: the process and the implementation Peter Hogan, Head of Technical, SMSF Association Jordan George, Head of Policy, SMSF Association				
12:15pm	LUNCH				
1:15pm	ACCUMULATION <i>Room: Plenary 1</i> CONCURRENT 1A Contributions using the CGT Cap Craig Day, Executive Manager, Technical Services, Colonial First State	TRANSITION <i>Room: Plenary 3</i> CONCURRENT 1B A marriage of a Will and a superannuation nomination: will they live happily ever after? Donal Griffin, Principal, Legacy Law Pty Limited	DRAWDOWN <i>Room: Plenary 2</i> CONCURRENT 1C Planning for the unplanned - TPD and Terminal Illness Tim Miller, Educator, Miller Super Solutions	SPECIALIST ONLY <i>Meeting Room 219</i> WORKSHOP Dancing with the experts - the SMSF strategy challenge Peter Burgess, General Manager, Technical Services & Education, SuperConcepts	SPECIALIST ONLY <i>Meeting Room 212 & 213</i> WORKSHOP Dancing with the experts - the SMSF strategy challenge Graeme Colley, Executive Manager, SMSF Technical and High Wealth, SuperConcepts
2:15pm	CONCURRENT 2A SMSFs and residency: negotiating the rules. Keep the SMSF and keep the tax concessions! Leigh Mansell, Technical Services Manager, Heffron SMSF Solutions	CONCURRENT 2B Latest CGT issues for SMSFs Darren Wynen, Senior contract trainer, TaxBanter	CONCURRENT 2C Capitalising on the super reforms opportunity Aaron Dunn, Managing Director, The SMSF Academy		
3:05pm	AFTERNOON TEA				
3:45pm	CONCURRENT 3A SMSFs investing through related unit trusts - the do's and don'ts and what to watch out for Shirley Schaefer, Partner, BDO and Nadia Alfonsi, Director- SMSF Client Engagement, Australian Taxation Office	CONCURRENT 3B Splitting under the Family Law Act Stephen Bourke, Director, Super/Splitting	CONCURRENT 3C SMSF pension opportunities, contingencies and some unfortunate realities Justine Marquet, Senior Technical Manager - TECE, AIA		
4:45pm	SPONSOR ADDRESS				
4:50pm	PLENARY SESSION 3 <i>Plenary 2</i> One thing in life is certain Scott Hay-Bartlem, Partner, Cooper Grace Ward				
5:40pm	'A SLICE OF VICTORIA' COLONIAL FIRST STATE WELCOME RECEPTION				

Day 2

8:30am PLENARY SESSION 4 <i>Plenary 2</i>					SPECIALIST ONLY Room: Meeting Room 219
1 on 1 with Bill McNabb (Global CEO of Vanguard) Bill McNabb, Global CEO Vanguard Investments and Chairman, US Investment Company Institute Andrew Gale, Chairman, SMSF Association					WORKSHOP Dancing with the experts - the SMSF strategy challenge Peter Burgess, General Manager, Technical Services & Education, SuperConcepts
9:10am PLENARY SESSION 5 <i>Plenary 2</i>					
Yes the SMSF sector is regulated Chris Jordan, Commissioner of Taxation, ATO Ian Taylor, Chairman, Tax Practitioners Board Peter Kell, Deputy Chairman, ASIC Jenny Wilkinson, Division Head, Retirement Income Policy Division, Treasury Andrea Slattery, Managing Director/CEO, SMSF Association					
10:05am MORNING TEA					
10:35am	YOUR BUSINESS Room: Plenary 1 CONCURRENT 4A Professionalism & Integrity = Trust? Dr. Deen Sanders, Chief Executive Officer, Professional Standards Authority	ACCUMULATION Room: Plenary 3 CONCURRENT 4B Blended Families and Insurance Julie Steed, Senior Technical Services Manager, Australian Executor Trustees	DRAWDOWN Room: Plenary 2 CONCURRENT 4C Benefit payments - the cans & cannots Lyn Formica, Director, McPhersons	OPEN WORKSHOP Room: Meeting Room 220 CONCURRENT 4D SMSF "Super Sleuth"- how to pick when someone is cheating! Jo Heighway, Partner, Deloitte	SPECIALIST ONLY Room: Meeting Room 219 WORKSHOP Do SMSFs represent the eternal marriage? Bryan Ashenden, Head of Financial Literacy and Advocacy, BT Financial Group
11:35am	CONCURRENT 5A The future of the SMSF Accounting and Advice Practice Peter Fry, Director, Peter Fry and Associates, Euan Sneyd, National Head of Practice Recruitment, Count Financial Limited, Brett Kenny, Director, Rogerson Kenny Business Accountants and Peter Hogan, Head of Technical, SMSF Association	CONCURRENT 5B SMSF myth busting Kate Anderson, Head of Technical Services, IOOF	CONCURRENT 5C Setting it straight: post budget implications on ECPI calculations Peter Crump, Executive Director, Private Client Adviser, ipac	CONCURRENT 5D Preparing for the next generation Caroline Harley, Senior Counsel SMSF, Greenfields SMSF Lawyers	
12:25pm LUNCH					
1:25pm	YOUR BUSINESS Room: Plenary 1 CONCURRENT 6A Automation and off-shoring: what is today and tomorrow's reality? Olivia Long, CEO, SuperGuardian, Ron Phipps-Ellis, Executive Director, Evolv, Craig Lawrenson, Head of SMSF, BT Financial Group and Peter Burgess, General Manager, Technical Services and Education, SuperConcepts	ACCUMULATION Room: Plenary 3 CONCURRENT 6B Top 10 stuff ups to avoid. What we learnt from judicial decisions in the last 12 months Bryce Figot, Director, DBA Lawyers	DRAWDOWN Room: Plenary 2 CONCURRENT 6C How safe are assets in an SMSF from creditors? Bankruptcy Act in context Chris Ketsakidis, Partner, Mills Oakley Lawyers	OPEN WORKSHOP Room: Meeting Room 220 CONCURRENT 6D 3.8 degrees of separation - do you know who you're dealing with? Mark Ellem, Executive Manager, SMSF Technical Services, SuperConcepts	SPECIALIST ONLY Room: Meeting Room 219 WORKSHOP "How to" when aged care and SMSFs intersect Louise Biti, Director, Aged Care Steps
2:25pm	CONCURRENT 7A Next generation adviser Craig Banning, Director, Wealth Adviser, Navwealth	CONCURRENT 7B Global and domestic trends and how they impact retirement Steve Halmarick, Head of Economic and Market Research, Colonial First State	CONCURRENT 7C Navigating the new measures: How the ATO is responding James O'Halloran, Deputy Commissioner, Superannuation, Australian Taxation Office	CONCURRENT 7D Property developments & SMSFs: Finding the needle in the haystack! Clinton Jackson, Partner, Cooper Grace Ward	
3:15pm AFTERNOON TEA					
3:45pm PLENARY SESSION 6 <i>Plenary 2</i>					
Does a blockchain make sense in the SMSF world? Peter Evans-Greenwood, Fellow, Deloitte Centre for the Edge					
4:40pm SPONSOR ADDRESS					
4:45pm PLENARY SESSION 7 <i>Plenary 2</i>					
INNOVATE 'think differently' Holly Ransom, CEO, Emergent Global					
5:40pm 'EXPLORE MELBOURNE' SCHROEDERS NETWORKING FUNCTION					

Day 3

8:30am	PLENARY SESSION 8 <i>Plenary 2</i>			
	<p>Policy certainty for SMSFs - are we there yet? The Hon. Bernie Ripoll, Managing Director, Fresh Advisory Jordan George, Head of Policy, SMSF Association Deborah Ralston, Professor of Finance, Monash University Facilitator: Robin Bowerman, Principal, Head of Market Strategy and Communications, Vanguard Investments Australia</p>			
9:15am	SPECIAL ADDRESS <i>Plenary 2</i>			
	<p>Hon. Kelly O'Dwyer MP, Minister for Revenue and Financial Services Senator Katy Gallagher, Shadow Minister for Small Business and Financial Services</p>			
9:35am	ACCUMULATION <i>Plenary 1</i> CONCURRENT 8A The SMSF trustee through the ASX looking glass - who, what, where and trends Ian Irvine, Head of Customer and Business Development, ASX	TRANSITION <i>Plenary 3</i> CONCURRENT 8B When life happens... (key triggers leading up to retirement that dictate changes in strategies) Jemma Sanderson, Director, Cooper Partners Financial Services	DRAWDOWN <i>Plenary 2</i> CONCURRENT 8C Longevity: you just might live to 100 Melanie Dunn, SMSF Technical Services Manager, Consulting Actuary, Accurium and Peter Crump, Executive Director, Private Client Adviser, IPac	SPECIALIST ONLY <i>Meeting Room 219</i> WORKSHOP "How to" future proof Trust Deeds Andrew Sinclair, Partner, Tax & Revenue, Cowell Clarke Commercial Lawyers
10:25am	MORNING TEA			
10:50am	ACCUMULATION <i>Plenary 1</i> CONCURRENT 9A SMSF & Property Steven Bennett, Fund Manager, Charter Hall and Brenda Hutchinson, Partner, Superannuation Advisory and Audit, TAG Financial Services	TRANSITION <i>Plenary 3</i> CONCURRENT 9B Top 10 ATO Compliance Issues Belinda Aisbett, Director, Super Sphere and Kasey Macfarlane, Assistant Commissioner, SMSF Segment, Superannuation, Australian Taxation Office	DRAWDOWN <i>Plenary 2</i> CONCURRENT 9C Income products in retirement David Knox, Senior Partner, Mercer, Craig Meldrum, Head of Technical Services and Strategic Advice, Australian Unity Personal Financial Services, Darren Kennedy, Manager, Retirement Income Policy Division, The Treasury and Peter Hogan, Head of Technical, SMSF Association	continued
11:45am	PLENARY SESSION 9 <i>Plenary 2</i>			
	<p>2017 and beyond: your conference wrap up Scott Hay-Bartlem, Partner, Cooper Grace Ward Craig Day, Executive Manager, Technical Services, Colonial First State Peter Hogan, Head of Technical, SMSF Association</p>			
12:20pm	CLOSING ADDRESS <i>Plenary 2</i>			
	<p>Andrew Gale, Chairman, SMSF Association</p>			
12:30pm	CLASS FINAL DAY LUNCH			
1:15pm	AWARDS CEREMONY <i>Melbourne Room</i>			
1:45pm	FINAL DAY GUEST SPEAKER - LEADING ON THE EDGE <i>Melbourne Room</i>			
	<p>Rachel Robertson, Antarctic Expedition Leader, Best Selling Author and Key Note Speaker</p>			



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For any enquiries please contact:
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events@smsfassociation.com
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