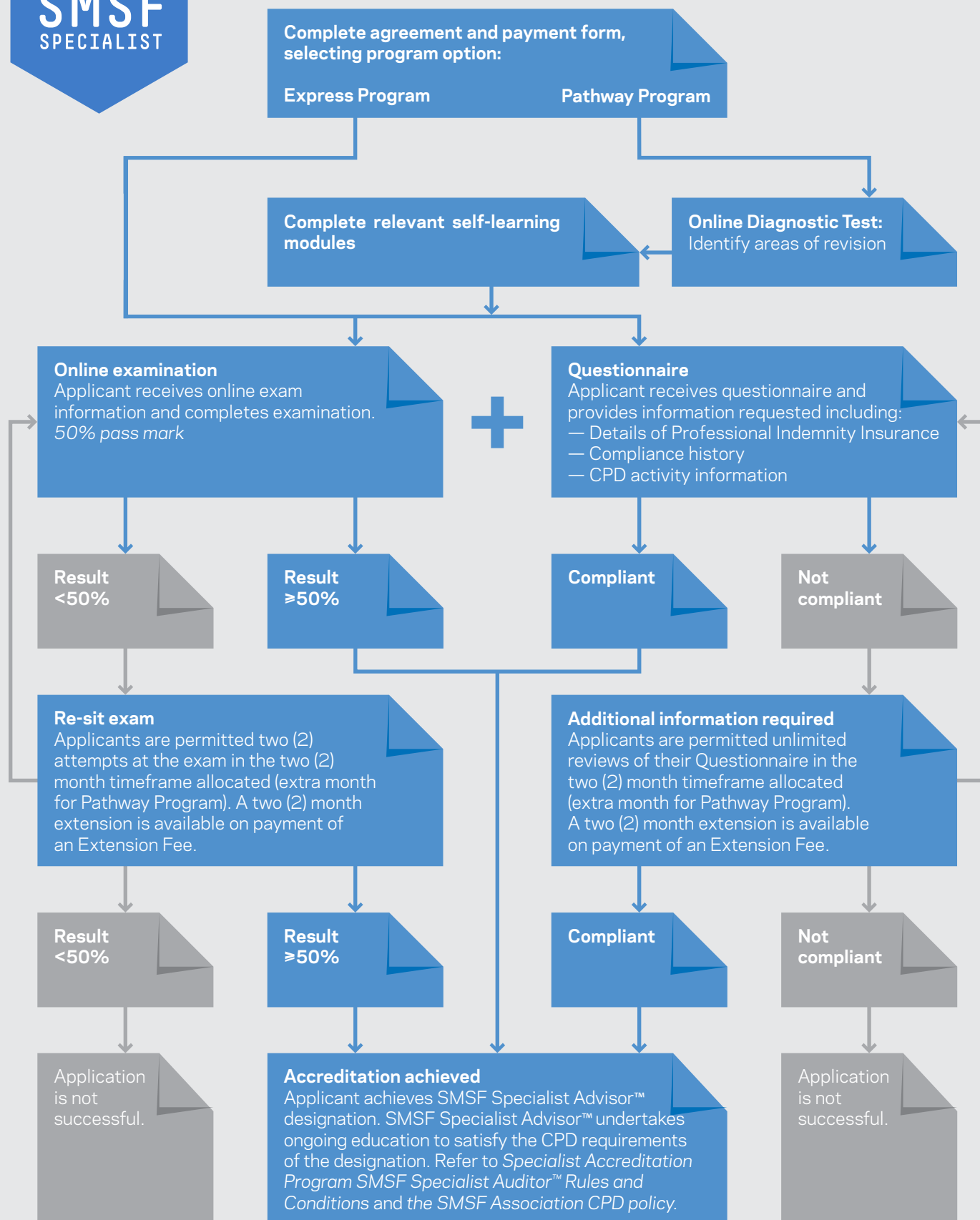


**Take the  
next step**  
SMSF Specialist  
Advisor™





## Accreditation Process



Schedule of fees (per member)	Express Program	Pathway Program
SMSF Specialist Advisor Accreditation & Certification	\$1,210	\$1,695
Extension Fee (if required)	\$220	\$220

Prices quoted are GST inclusive

# What is the SMSF Association Accreditation Program?

The SMSF Association is the peak professional body representing SMSF professionals and the SMSF sector in Australia.

The SMSF Association has developed an accreditation program to ensure professional standards are achieved and maintained by practitioners specialising in the provision of services to the SMSF sector. This is the first program in Australia to offer independent certification of an advisor from either the wholesale or retail sectors and offers a verification of a practitioner's competence, independence, experience and knowledge.

Through accreditation, Specialist Members demonstrate they have attained the benchmark set by the association and can brand and promote their specialisation in the marketplace.

SMSF Association Specialists:

- are recognised by peers as having comprehensive specialist SMSF skills and knowledge;
- have made a professional commitment to maintaining currency and compliance with legislation; and
- are able to show professionalism in conducting services in the SMSF Industry.

The **SMSF Specialist Advisor™ (SSA™)** accreditation is for SMSF professionals, including but not limited to; accountants, auditors, financial planners, administrators, lawyers, educators, estate planners, actuaries and strategists seeking recognition for their SMSF skills and knowledge as well as knowledge of the SIS, Tax and Corporations Law.

## Who can apply for SMSF Specialist Advisor accreditation?

Associate Members are eligible to apply for accreditation as an SMSF Specialist Advisor. The SMSF Association recommends that Associate Members should meet the following criteria prior to entering the program:

- Have a minimum two (2) years' experience providing advice and/ or services to the retail or wholesale SMSF sector.
- SMSF related work activities should account for, or be growing towards a minimum of 10% of total workload.

## SMSF Specialist Advisor Program Options

The SMSF Specialist Advisor accreditation program offers members two distinct program options:

### 1. Express Program

Suitable for members that wish to complete the accreditation program based on their current SMSF expertise.

### 2. Pathway Program

Suitable for members that seek validation of their SMSF knowledge and guidance on their development needs prior to attempting the online examination component of the program. This option includes:

- a. A Diagnostic self-assessment test that assists the member to identify areas that may require additional revision prior to attempting the online examination.
- b. Access to nine (9) self-learning modules to assist with revision in the relevant areas identified through completion of the Diagnostic self-assessment test. The member is able to focus in on only those modules identified as requiring revision, or work through all nine of the modules to aid preparation for the online examination.

## How do I get accredited?

To apply for SMSF Specialist Advisor accreditation you will need to:

- be an Associate Member of the SMSF Association.
- login to the SMSF Association website and access the Specialist Accreditation Program — SMSF Specialist Advisor Rules & Conditions
- complete the Agreement & Payment Form (see back page) and submit with payment to SMSF Association, or register online at [www.smsfassociation.com](http://www.smsfassociation.com) selecting the Program Option. On receipt, we will email you an accreditation information pack.
- complete the two components of the program; the Online Examination and the SMSF Specialist Advisor Questionnaire

If you have selected the Pathway Program above, you will receive details of how to access the Diagnostic self-assessment test and nine self-learning modules.

## SMSF Specialist Advisor Accreditation Exam

The online examination process is fully supervised. Your nominated examination supervisor is responsible for ensuring the SMSF Association exam conditions are adhered to. The Online Exam Centre provides you and your supervisor the convenience of deciding when and where the examination is to be conducted.

The Online Exam is 2 hours in duration and consists of 120 multiple choice questions. No written answers are required.

Access to the exam is via a unique electronic log-in and password. A maximum of two

(2) attempts to pass the Online Exam are permitted.

In order to prepare for the Online Exam you will be given the following:

- Access to the SMSF Association Online Exam Centre which provides information on how to navigate the online exam environment;
- Practice Exam Questions that enable you to determine the level at which the questions in the exam are set;
- A list of Examinable Topics.

**Important note:** This accreditation program is **not** an educational course, therefore the SMSF Association **does not** supply any further materials other than those stated above. Any study undertaken prior to the exam is at the applicant's discretion with the SMSF Association's list of examinable topics enabling the applicant to design their own learning program.

## Questionnaire

This short questionnaire tests and verifies your adherence to the SMSF Specialist Advisor Program Eligibility Criteria. You are required to provide details of your compliance history and record details of your CPD activities. The SMSF Association will review your completed questionnaire and analyse CPD information provided.

## Program Timeframes

You are required to successfully complete both the Online Exam and Questionnaire within **two** months of entering the program.

**Note:** If you have selected the Pathway Program, you will have **one extra** month to complete the Diagnostic self-assessment test and optional self-learning modules prior to completing the compulsory components of the Program

If you fail to successfully complete the Specialist Accreditation Program within the required timeframe specified above, you may apply for a maximum two month extension, paying the Extension Fee of \$220.

Failure to successfully complete both components within **four** months, or **five** months if the Pathway Program is selected, of entry into the program will result in your application being terminated, forfeiture of fees paid and results already earned. Should you wish to re-enter the Specialist Program in the future you will be subject to the same conditions as all new entrants, that is, you will be required to pay in full and successfully complete both components of the Program.

Special circumstances can be submitted to the SMSF Association's Professional Standards Committee (PSC) for consideration.

## Applicant details

<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Other (please specify)	SMSF Assoc membership number
First Name		Surname		Position/title
Email		Telephone	Facsimile	
Mobile		Occupation (primary)	Occupation (secondary)	

## Business details

Trading name		ABN
Legal name		ACN
Business address		
Suburb	State	Postcode
Website	Dealer group name (if applicable)	
AFS licence number	Issue date	
Authorised representative number	Issue date	

## Category of advice provided:

<input type="checkbox"/> Wholesale advice—direct advice to other professional advisors
<input type="checkbox"/> Retail advice—direct advice to trustees/members

## Professional Development

Have you undertaken a training course to prepare for this accreditation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If YES, which course did you undertake?	Education Provider:	

## Select Program option

<input type="checkbox"/> Express Program—\$1,210	<input type="checkbox"/> Pathway Program—\$1,695
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## Payment details

<input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard	<input type="checkbox"/> Amex (attracts 1% surcharge)
Credit card no.	<input type="text"/>	Expiry <input type="text"/> / <input type="text"/>
Cardholder's name	CVV	<input type="text"/>
Signature		
Total charged AUD\$	Date	
<input type="checkbox"/> Direct deposit (BSB: 033-113; Acc: 191756)	<input type="checkbox"/> Cheque (payable to SMSF Association)	

## Declaration—Accreditation designation

<input type="checkbox"/> I confirm I am applying for the SMSF Specialist Advisor™—SSA™ designation; I confirm acceptance of the Terms and Conditions as outlined below; and I declare that the information provided in this form is true and correct.
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Name	Signature	Date
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## Terms and Conditions

- I acknowledge that the information provided to the SMSF Association for the purposes of Accreditation is true and correct.
- I acknowledge that I have read and will abide by the Specialist Accreditation Program SMSF Specialist Advisor™ Rules and Conditions.
- I acknowledge that by signing this written application I am entering into a contract for the member supply of Accreditation and independent Certification services.
- In order to maintain continued compliance,

the SMSF Association reserves the right to change the Conditions of this agreement. Written notification will be given to each applicant.

- I agree to provide any further information that will affect or influence the Accreditation status or Accreditation decision.
- I also consent to the privacy terms and background checks that the SMSF Association will undertake as part of the Accreditation program as presented in the Specialist Accreditation Program SMSF Specialist Advisor™ Rules and Conditions.

## Send this form to:

Email  
memberservices@smsfassociation.com  
Mail  
SMSF Association  
PO Box 6540  
Adelaide SA 5000

## For more information:

www.smsfassociation.com  
enquiries@smsfassociation.com  
Toll free 1300 779 096