



SMSF Association
Technical Day
Series 2018

ADELAIDE

TUESDAY 14 AUGUST 2018

Adelaide Oval

MELBOURNE

WEDNESDAY 15 AUGUST 2018

Melbourne Convention
& Exhibition Centre

SYDNEY

THURSDAY 16 AUGUST 2018

Sofitel Sydney

BRISBANE

TUESDAY 21 AUGUST 2018

Brisbane Convention
& Exhibition Centre

PERTH

THURSDAY 23 AUGUST 2018

Perth Convention
& Exhibition Centre

PRICING

Early Bird Member \$620

Standard Member \$750

Non-member \$795

Early Bird closes on 13 July 2018

All prices include gst



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Water Bottles



Snack Break



Coffee

Program

TIME	AGENDA	SPEAKER
7:45AM	REGISTRATION/ARRIVAL TEA & COFFEE	
8:30AM	Welcome and Opening Address	Peter Hogan Head of Education and Technical SMSF Association
8:32AM	SMSF Association CEO Address	John Maroney CEO SMSF Association
8:40AM	SMSF Association Chair Address (VIC, QLD, NSW)	Dr. Deborah Ralston Chair SMSF Association
8:45AM	Introduction - an industry update	Peter Hogan Head of Education and Technical SMSF Association
9:00AM	The key issues of SMSF set-up	Australian Taxation Office
9:30AM	Topical tips, tricks and traps when taking on new trustees The thrill of signing on a new SMSF client can turn into terrifying trouble if the engagement process is not appropriately risk managed. In this session Peter Bobbin will focus on you. He will guide you on a series of client-litigation risk management checklist strategies. You will learn; <ul style="list-style-type: none"> Your ethical obligations to new clients and their prior advisers The importance of managing cross-occupational standards The key elements in an engagement and why avoid client signed retainers How to manage the very common multi-member instruction failure The due diligence checklist you need to follow to check their SMSF is in good working order The importance of the slipped disc on a chip case 	Peter Bobbin Managing Principal Argyle Lawyers
10:20AM	MORNING TEA	
10:50AM	Asset ownership for retirement: structuring investments the clever way Setting up an SMSF: Trustee responsibilities (SMSF suitable; Corp/indiv trustee; small balances, SPT, etc) and Structuring Investments (JVs, Trusts, SMSFs as part of a holistic financial management plan, etc)	Peter Hogan Head of Education and Technical SMSF Association
12:30PM	LUNCH	
13:30PM	The bricks and mortar of holding property in a SMSF Building on the previous workshop, we consider the various issues and options for an SMSF holding property. Using the case study, we will explore the technical and practical challenges that arise for advisers and trustees where an SMSF involves itself with property ownership. Issues covered will include: <ul style="list-style-type: none"> Structuring options Liquidity issues Contribution restrictions and Total Super Balance Tax consequences of Transfer balance cap Borrowing restrictions and hurdles 	Mark Ellem Executive Manager SMSF Technical Services SuperConcepts
15:15PM	COMFORT BREAK	
15:30PM	SMSF insurance strategies for 2018 and beyond The 2017 changes to superannuation and 2018 Budget proposals have broad implications for insurance and estate planning strategies within SMSFs. As life insurance is often a critical part of estate planning, advice professionals need to consider the effect of these changes on existing and future life insurance advice. Using a case study, this session will analyse insurance strategies for SMSFs, including: <ul style="list-style-type: none"> How the 2018 Budget proposals will affect existing insurance strategies that clients have in place Why the 2017 superannuation changes are a good reason to revisit reversionary pensions, and Insurance inside or outside of superannuation - what the regulators have had to say 	Natasha Panagis Technical Manager AIA Vitality
16:20PM	The day's summary	Peter Hogan Head of Education and Technical SMSF Association
16:35PM	NETWORKING FUNCTION	
17:30PM	END TIME	



Peter Hogan

Head of Education and Technical
SMSF Association

Peter Hogan is the SMSF Association's Head of Education and Technical. He is one of Australia's foremost SMSF specialists, having worked in the sector over many years. A lawyer by training, he cut his teeth in the ATO before joining some of Australia's largest financial institutions to work in key superannuation, investment and taxation roles. His enormous industry experience and knowledge, especially as they pertain to tax issues, means he is in constant demand on the SMSF speaking circuit. Away from the world of SMSFs, he is a keen weekend golfer when he is not providing a taxi service to junior sporting events. Peter is an SMSF Association Specialist Adviser and former Chair and National Board member of the Association.



John Maroney

CEO
SMSF Association

John Maroney was appointed as the CEO of the SMSF Association in May 2017.

John has worked in the financial services industry for over 30 years and was recognised as a leader in Australia's Financial Services sector before his appointment to the International Association of Insurance Supervisors in 2009. Most of John's experience in Australia has been in the superannuation or insurance sectors and managing professional and industry associations.

He is passionate about helping all Australians to be better prepared for a secure and dignified retirement, especially those who have chosen to utilise self-managed superannuation funds as the main component of their retirement saving. John is thrilled to have been selected as the CEO of the SMSF Association and to now have the opportunity to boost the Association's recognition as the peak professional body and its representation of the more than one million SMSF trustees.

John's experience includes extensive senior management and consulting roles in superannuation, insurance, Australian and international financial regulation, actuarial and risk management plus managing professional and industry associations. He has been employed by large and small employers and consultants, within the private and public sectors, within Australia and internationally and he also was self-employed for several years while he developed a successful consulting firm. Key roles include CEO of the Actuaries Institute, Australian Government Actuary and Head of Capital and Solvency at the International Association of Insurance Supervisors, which is hosted by the Bank for International Settlements in Basel, Switzerland.



Dr. Deborah Ralston

Chair
SMSF Association

Deborah Ralston has over 20 years experience as a non-executive director on public and private sector boards. She is a member of the RBA's Payments System Board and is currently Chair of the SMSF Association.

Deborah is a recognised thought leader in financial services, with particular interests in financial regulation, superannuation, innovation and commercialization. She has published widely in these areas. She is a Professorial Fellow at Monash University.

She has a Master of Economics, a PhD in Finance and is a Fellow of CPA and AICD.



Speakers



Peter Bobbin

Managing Principal
Argyle Lawyers

For nearly 30 years Peter has earned respect for his fine planning and strategy skills in the areas of superannuation, taxation, estate and business succession planning, commercial structuring, regulatory compliance, and general commercial issues.

Whatever Peter undertakes, his focus is foremost on the outcome, not the process. As a former university lecturer, frequent commentator on the law and former accountant, Peter can't help but bring a practical and insightful approach to law. For this reason he counts as clients the financial services arms of every major financial institution in Australia, public companies, and associations.

Peter advises both individuals and businesses, working with many corporate and high net wealth clients as well as accountants, financial advisers, and other lawyers.

Through his wide network Peter is also active in lobbying government to support a good cause or achieve better outcomes in the law. He's successfully had laws amended and was the only individual (non-association) representative invited to the Federal Treasury initiative on the Ralph Report to tax trusts as companies.

Peter takes his role as charity trustee of the Future2 Foundation very seriously and is an active member of numerous professional associations in the financial services, superannuation, and planning industries.

He's also a keen cyclist and has taken part in the Future2 Wheel Classic, riding each year for the past years from 2010.



Mark Ellem

Executive Manager
SMSF Technical Services
SuperConcepts

Mark holds the position of Executive Manager, SMSF Technical Services with SuperConcepts, providing technical and compliance support on SMSFs to financial advisors and accountants as well ensuring that SuperConcepts' leading SMSF administration and compliance platform, SuperMate, is compliant with the latest superannuation and taxation rules.

An accredited SMSF Specialist Advisor with the Self Managed Super Fund Association, he is also a Fellow of CPA Australia and the Institute of Public Accountants (IPA), as well as being a Registered Tax Agent.

Prior to his current role with SuperConcepts, Mark spent considerable time in accounting practices and SMSF administration companies, including running his own accountancy practice and SMSF administration and compliance advice company for ten years.



Natasha Panagis

Technical Manager
AIA Vitality

Natasha is a Technical Manager for AIA Australia's Technical Education Centre of Excellence (TECE) Team.

Her experience includes providing technical and strategy support to financial advisers on a broad range of wealth management areas, from superannuation through to taxation, estate planning, insurance, social security and aged care planning.

Prior to joining AIA Australia, Natasha was a Technical Manager at Aged Care Steps and Strategy Steps and has held technical roles with Centric Wealth and FuturePlus Financial Services.

Natasha's qualifications include a Bachelor of Business (Management), a Bachelor of Business (Applied Finance) and an Advanced Diploma of Financial Services (Financial Planning). She is also a Certified Financial Planner® (CFP) and a SMSF Specialist Adviser™ (SSA).



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