

# SMSF Association

CPD Accreditation Training Programs

Validation. Credibility. Differentiation.



*Together we're building SMSF professionals*



Self Managed  
Super Fund  
Association

# SMSF ASSOCIATION CPD ACCREDITATION

The self managed super fund sector is a dynamic area of the financial services industry.

As SMSF regulations and the market as a whole continue to evolve to keep up with the sector's remarkable growth, specialist SMSF education and training has never been more critical for professionals in the industry. This presents educators with new opportunities to meet the increasing demand for independently accredited SMSF training programs.

The SMSF Association is dedicated to lifting the standard of professional SMSF advice and has developed a CPD Accredited Training Program to validate the SMSF education in the marketplace.

The SMSF Association's CPD Accreditation gives professionals confidence that their continuing professional development (CPD) activities meet the high standards of Australia's peak SMSF body.

The SMSF Association's CPD Accreditation provides educators with industry recognition and a range of benefits designed to help develop, run and promote quality educational programs.

Apply now to have your SMSF training program accredited by the SMSF Association and reap the benefits of the Association's independent validation.



# ABOUT THE SMSF ASSOCIATION

The SMSF Association is recognised as the peak body for professional advisors and the leading association within the self-managed super fund industry in Australia.

We are unique because:

- Our membership is multi-disciplinary, with SMSFs the common denominator
- Our members are highly engaged and passionate about the SMSF industry

Our membership is represented by the following occupations:

Financial Planner	40%
Accountant/Tax Agent	40%
Other	10%
Auditor	4%
Lawyer	3%
Administrator	3%

Our focus is on raising the standard of advice provided by professionals within the sector.

We do this by:

1. Enhancing education opportunities for SMSF professionals
2. Developing expert technical content for our members
3. Advocating to government and the regulators for the betterment of the industry
4. Providing independent validation of education programs
5. Awarding industry designations which personify excellence in SMSF knowledge.

# BENEFITS OF SMSF ASSOCIATION CPD ACCREDITATION

The SMSF Association's CPD Accreditation provides external SMSF training programs with:

## Validation

Receive validation that your education materials and resources are aligned to the SMSF Association's education standards and industry defined curriculum.

## Credibility

Enhance the credibility of your SMSF training program by aligning with a brand that industry professionals know, trust and respect.

## Differentiation

Distinguish your training program from that of your competitors, with CPD accreditation that SMSF Association members and other industry professionals seek out as endorsement of quality.

## Entitlements

- Award SMSF Association CPD points to participants who successfully complete your training program.
- Be featured on the SMSF Association Accredited Education web page with a link to your event registration page.

The SMSF Association's CPD Accreditation assessment is conducted in accordance with the Association's CPD Policy and Education Standards.

## SMSF Association Education Standards

The SMSF Association has consulted with a wide range of SMSF Practitioners, Regulators and Trustees to determine the required content of SMSF education.

The SMSF Association Education Standards outline ten knowledge areas which ensure the provision of good SMSF Advice.

The knowledge areas relate to matters that include:

- Audit
- Strategy
- Trust Deeds
- Benefit Payments
- Practice Management
- Estate Planning
- Contributions
- SMSF Administration
- Managed Investments
- Taxation

## Who can apply for SMSF Association CPD Accreditation?

We welcome all providers of SMSF CPD training to have their program assessed for CPD points, including:

- Registered training organisations
- Higher education institutions
- Industry associations
- Subject matter experts
- SMSF practitioners
- Publications and media outlets
- Research houses
- Financial institutions
- Licensees

# ASSESSING YOUR PROGRAMS

## How do we assess your programs for SMSF Association Accreditation?

Programs are assessed under one of two categories: 'Passive' or 'Active' education. The awarding of CPD is done in line with the CPD Policy and Education Standards. The SMSF Association CPD Policy can be found [here](#).

### Educators have two options for CPD Accreditation:

Option	Suited to	Valid for	CPD basis
1. Passive Education Review	Education activities such as single events, webinars or conference presentations that generally don't have any assessment or quizzes.	12 months	Up to 1 point per hour + any KA (Knowledge Area points* determined by the SMSF Association
2. Active Education Review	<p>Courses such as workshops, seminars, online courses and training days. Where the focus is on improving knowledge and reinforcing the practical skills being taught through case studies, discussion groups, role play, interactive activities or an assessment</p> <p>Content provided under the active education review is more intensively reviewed. It is evaluated against criteria that accurately measures the quality of the educational outcome, assessment, education experience and industry relevance.</p>	12 months	Up to 2 points per hour + any KA (Knowledge Area) points* determined by the SMSF Association

\*KA (Knowledge Area) points: Each year the SMSF Association identifies a range of topics that are shaping the SMSF Professionals' space - extra points may be allocated if the criteria are met.

Examples of active and passive activities/courses	Active	Passive
One-hour conference presentation, with notes distributed.		✓
Two-hour breakfast technical session with guest speaker and Q&A session at end.		✓
One-day workshop where participants discuss case studies and are quizzed on their knowledge at the end.	✓	
Four-day seminar where participants role play, take part in forums and complete an online multiple-choice quiz.	✓	
Online course with assessment at the end.	✓	

# FEE SCHEDULE AND APPLICATION PROCESS

## Fee schedule

Accreditation type	Activity duration	Cost (incl GST)	
		Passive	Active
Seminars, Conferences, Workshops, etc	> 2 hrs	\$380.00	\$530.00
	2-4 hrs	\$500.00	\$660.00
	1 day (4-8hrs)	\$920.00	\$1,060.00
	2 day	\$1,320.00	\$1,570.00
	3 day	\$1,440.00	\$1,800.00
Series Examples: monthly webinars, quarterly training updates, etc	6 activities or less	\$1,450.00	\$1,825.00
* A series is any activity delivered several times within a 12 month period. * The content/topics or presenter may be changed each time an activity is delivered, but the format, length and delivery style remain consistent	6 to 12 activities	\$1,600.00	\$1,990.00
Note: material should be submitted 4 times per year for SMSF Association quality assurance (if an activity is delivered monthly, then the sessions need to be grouped and submitted for review quarterly).	Journals/articles	\$1,600.00	\$1,990.00
Tertiary Programs/Programs resulting in a formal qualification		N/A	\$2,340.00

## Application process

### Step 1: Submit your activity

Once your program is developed, send a completed application form here, along with supporting materials, via email to [education@smsfassociation.com](mailto:education@smsfassociation.com) or via mail to  
SMSF Association  
CPD Accreditation,  
Level 9, 65 York Street Sydney  
NSW 2000

### Step 2: What next?

We will assess your program against our CPD Policy and Education Standards. If approved, you will receive an SMSF Association review report as outlined in entitlements.

If your program needs some modifications, we will provide you with feedback and recommendations.

If you have any questions about the process, please contact Clair Bland, E-Learning Specialist on 02 8311 4183 or [clairbland@smsfassociation.com](mailto:clairbland@smsfassociation.com)

### SMSF Association

#### National Office

Level 3,  
70 Pirie Street  
Adelaide, SA 5000

#### Sydney Office

Level 9,  
65 York Street  
Sydney, NSW 2000

Tel: 08 8205 1900

[education@smsfassociation.com](mailto:education@smsfassociation.com)  
[www.smsfassociation.com](http://www.smsfassociation.com)



# SMSF ASSOCIATION CPD ACCREDITED TRAINING PROGRAM APPLICATION FORM



Self Managed  
Super Fund  
Association

Please return this form via email at: [education@smsfassociation.com](mailto:education@smsfassociation.com)

## Application details

Application Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_

Position Title: \_\_\_\_\_ Email: \_\_\_\_\_

Organisation & Address: \_\_\_\_\_

## Application details

Program details: \_\_\_\_\_

Presenter/s Name, Title & Company: \_\_\_\_\_

Course Date(s): \_\_\_\_\_ Website: \_\_\_\_\_

## Program Type

Please select an option:

Accreditation type	Activity duration	Cost (incl GST)	
		Passive	Active
Seminars, Conferences, Workshops, etc	> 2 hrs	\$380.00	\$530.00
	2-4 hrs	\$500.00	\$660.00
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	6 to 12 activities	\$1,600.00	\$1,990.00
	Journals/articles	\$1,600.00	\$1,990.00
Tertiary Programs/Programs resulting in a formal qualification		N/A	\$2,340.00

\*All accreditations are valid for 12 months from date of issue.

## Which members should we tell about your program?

Please tick an option:

- Accountants       Administrators       Lawyers       Other? \_\_\_\_\_  
 Financial Planners       Tax Agents       Actuaries  
 Auditors       Estate Planners       Corporate Management

## Where is your training being held?

Please tick an option:

- All of Australia       Hobart       WA regional       ACT  
 Sydney       TAS regional       Darwin       Anywhere as the course is online/distance  
 NSW regional       Adelaide       NT regional  
 Melbourne       SA regional       Brisbane  
 VIC regional       Perth       QLD regional

## Is there an entry requirement for attendees?

Please tick an option:  Yes     No     If yes, what is it? \_\_\_\_\_

## What knowledge level is your program pitched at?

- Emerging (participants who consider themselves on the upward learning curve)  
 Experienced (participants who feel they know enough but would like to gain a deeper understanding of the specifics)  
 Expert (participants who know most things, so it's really about keeping abreast of changes)

What SMSF content does your program cover?

- New Funds
- SMSF Administration
- Contributions
- Managing Investments
- Taxation
- Benefit Payments
- Winding Up
- Practice Management
- Audit
- Estate Planning
- Strategy

Do you offer SMSF Association members any discounts or special pricing?

Please tick an option:  Yes  No  If yes, please specify \_\_\_\_\_

Program Evidence

Please ensure the following documents are attached.

All programs:

- A timetable or agenda of the program with duration, title and description of each session identified
- A copy of the program notes/presentation
- Evidence of the developer/presenter’s expertise in the topic (biographies, description of background in SMSFs/education, etc)
- Examples of marketing material for the program (brochure, weblinks, etc)

Active assessment:

- If you are applying for an Active assessment, please also attach the following:
- A copy of the assessment (including instructions and duration)
- A copy of the evaluation form
- A copy of the marketing material used to promote this program
- Evidence/description of the quality review process for program materials and assessment

Declaration Form

I, \_\_\_\_\_ (insert name), acting on behalf of  
 \_\_\_\_\_ (insert company name) the legal entity  
 providing the SMSF training program, hereby wish to apply for \_\_\_\_\_ (insert course title)  
 to become CPD Accredited by the SMSF Association.

1. I certify that the organisation will:
  - (a) Make no claim that any other program other than that listed above is accredited with the SMSF Association;
  - (b) Not use this accreditation or any other accreditation documents in a misleading manner or in any way that could bring the SMSF Association into disrepute;
  - (c) Participate in audits of this training program initiated by the SMSF Association;
  - (d) Notify the SMSF Association in writing of any fundamental changes to the program.
2. I understand that this accreditation may not be awarded and/or may be rescinded if the organisation:
  - (a) Fails to provide true and correct information of a material nature in this application; or
  - (b) Fails to fulfill the undertakings outlined in point 1.

I agree  I do not agree Date: \_\_\_\_\_

Payment Method

Invoice  Credit card payment:  Visa  Mastercard  AMEX

Card number: \_\_\_\_\_ Expiry date (mm/yy): \_\_\_\_\_

Cardholder’s name: \_\_\_\_\_ CVV no.: \_\_\_\_\_

SMSF Association

**National Office**  
 Level 3,  
 70 Pirie Street  
 Adelaide, SA 5000

**Sydney Office**  
 Level 9,  
 65 York Street  
 Sydney, NSW 2000

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 education@smsfassociation.com  
 www.smsfassociation.com

