



# Your Membership Benefits

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**PROFESSIONAL  
MEMBERS**





## INTRODUCTION

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In a rapidly changing environment, your SMSF Association membership aims to prepare and support you to provide quality SMSF advice and services now, and into the future. The SMSF sector, comprising 1.1 million Australians, is growing and it is of utmost importance that they are provided with sound financial advice and support to ensure that SMSF members can achieve a secure and dignified retirement. I encourage you to make the most of the professional development opportunities available to you through membership of the SMSF Association.

A handwritten signature in black ink that reads "John L. Maroney". The signature is written in a cursive style with a large, looped initial "J".

**John Maroney**  
**Chief Executive Officer**  
**SMSF Association**

The SMSF sector, comprising 1.1 million Australians, is growing and it is of utmost importance that they are provided with sound financial advice and support to ensure the prosperity of the SMSF sector.



## THE SMSF ASSOCIATION

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The SMSF Association is the independent, professional body representing Australia's self managed super fund sector. With over 1.1 million Australians now self managing their super, the SMSF Association's mandate is an important one - to lead the professionalism, integrity and sustainability of the SMSF sector - as a major source of our nation's prosperity for today and our future.

The Association's core focus is to raise the standard of advice provided by all SMSF professionals and enable trustees to become better educated and make informed decisions for their future retirement.

As the peak body representing the SMSF sector, the Association has the vital role of continually improving the quality of advisors, the knowledge of trustees and the credibility and health of a vibrant SMSF community.

The SMSF Association leads the professionalism, integrity and sustainability of the SMSF sector.

## KEY BENEFITS

### GAIN THE MOST OUT OF YOUR MEMBERSHIP

COMPLIMENTARY CPD INCLUDING:

- QUARTERLY LEGISLATION AND REGULATION UPDATE WEBINARS
- ANNUAL BUDGET UPDATE

GO—TO GUIDES: PRACTICAL DAY TO DAY REFERENCE GUIDES TO DEAL WITH SMSF KEY ISSUES

FULL SUITE OF INFORMATIVE COMMUNICATIONS INCLUDING: DAILY SMSF INDUSTRY NEWS, MEMBER NEWS, AND SMSF NEWS ALERTS TO KEEP YOU UP TO DATE

TECHNICALLY SPEAKING: BI-MONTHLY IN-DEPTH SMSF TECHNICAL EXPLORATION INCLUDING CPD POINTS

WHITE LABEL TEMPLATES ON KEY TOPICS TO SEND TO YOUR CLIENTS

ACCESS TO COMPREHENSIVE ONLINE RESOURCE LIBRARY

ONLINE CPD COMPASS KNOWLEDGE CHECK

ACCESS TO ONLINE SMSF TRUSTEE KNOWLEDGE CENTRE

COMPLIMENTARY SUBSCRIPTIONS AND ACCESS TO DISCOUNTED PRODUCTS AND SERVICES

INVITATION TO PROVIDE FEEDBACK AND COMMENTARY ON SMSF POLICY

ALL SMSF ASSOCIATION EVENTS AT PREFERENTIAL MEMBER RATES

TECHNICAL RESEARCH SERVICE

ACCESS TO EXCLUSIVE NATIONAL CONFERENCE AND TECHNICAL DAY EARLY BIRD RATES

ACCESS TO SMSF PRACTITIONER PROGRAM

ACCESS TO SPECIALIST ACCREDITATION PROGRAMS

ACCESS TO SMSF ASSOCIATION LINKEDIN GROUP

ACCESS TO SMSF ASSOCIATION ENDORSED PROFESSIONAL INDEMNITY COVER

USE OF SPECIALIST BRANDING - LOGO, DESIGNATION, POST-NOMINALS

PROMOTION OF YOUR ADVICE AND SERVICES ON 'FIND A SPECIALIST' DIRECTORY

TAX AGENT/ TAX (FINANCIAL) ADVISOR REGISTRATION

## EMERGING PROFESSIONAL (AFFILIATE MEMBERSHIP)

THE FIRST STEP IN YOUR SMSF CAREER. MASTER KEY SMSF FOUNDATIONS.

UNDER 2 YEARS PROFESSIONAL SMSF EXPERIENCE

## PROFESSIONAL (ASSOCIATE MEMBERSHIP)

GROW YOUR SMSF CAREER AND IMPROVE YOUR TECHNICAL KNOWLEDGE AND CONFIDENCE.

2 YEARS + OF PROFESSIONAL SMSF EXPERIENCE

## SPECIALIST (SPECIALIST MEMBERSHIP)

SHOWCASE YOUR SMSF EXPERTISE AND PROFILE YOURSELF AND YOUR BUSINESS.

COMPLETED THE SMSF ASSOCIATION SPECIALIST ADVISOR™ OR SPECIALIST AUDITOR® PROGRAM

COMPLIMENTARY CPD INCLUDING: — QUARTERLY LEGISLATION AND REGULATION UPDATE WEBINARS — ANNUAL BUDGET UPDATE	●	●	●
GO—TO GUIDES: PRACTICAL DAY TO DAY REFERENCE GUIDES TO DEAL WITH SMSF KEY ISSUES	●	●	●
FULL SUITE OF INFORMATIVE COMMUNICATIONS INCLUDING: DAILY SMSF INDUSTRY NEWS, MEMBER NEWS, AND SMSF NEWS ALERTS TO KEEP YOU UP TO DATE	●	●	●
TECHNICALLY SPEAKING: BI-MONTHLY IN-DEPTH SMSF TECHNICAL EXPLORATION INCLUDING CPD POINTS	●	●	●
WHITE LABEL TEMPLATES ON KEY TOPICS TO SEND TO YOUR CLIENTS	●	●	●
ACCESS TO COMPREHENSIVE ONLINE RESOURCE LIBRARY	●	●	●
ONLINE CPD COMPASS KNOWLEDGE CHECK	●	●	●
ACCESS TO ONLINE SMSF TRUSTEE KNOWLEDGE CENTRE	●	●	●
COMPLIMENTARY SUBSCRIPTIONS AND ACCESS TO DISCOUNTED PRODUCTS AND SERVICES	●	●	●
INVITATION TO PROVIDE FEEDBACK AND COMMENTARY ON SMSF POLICY	●	●	●
ALL SMSF ASSOCIATION EVENTS AT PREFERENTIAL MEMBER RATES	●	●	●
TECHNICAL RESEARCH SERVICE		●	●
ACCESS TO EXCLUSIVE NATIONAL CONFERENCE AND TECHNICAL DAY EARLY BIRD RATES		●	●
ACCESS TO SMSF PRACTITIONER PROGRAM		●	●
ACCESS TO SPECIALIST ACCREDITATION PROGRAMS		●	●
ACCESS TO SMSF ASSOCIATION LINKEDIN GROUP		●	●
ACCESS TO SMSF ASSOCIATION ENDORSED PROFESSIONAL INDEMNITY COVER		●	●
USE OF SPECIALIST BRANDING - LOGO, DESIGNATION, POST-NOMINALS			●
PROMOTION OF YOUR ADVICE AND SERVICES ON 'FIND A SPECIALIST' DIRECTORY			●
TAX AGENT/ TAX (FINANCIAL) ADVISOR REGISTRATION			●

## KEY PROFESSIONAL DEVELOPMENT EVENTS

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### Conferences

Ranging from regional roadshows, 1 day metropolitan technical conferences and the industry pinnacle - the 2 ½ day National Conference. Each of these highly regarded conferences offer delegates the opportunity to engage with their peers, workshop ideas and apply their understanding of SMSF knowledge and skills. Attracting the best practitioners, the best speakers and the best exhibitors - our conferences are regarded as the leading SMSF conferences in Australia.

### SMSF Association Masterclass Series

The Masterclass Series provides in depth technical analysis in four parts: individual pre-course quiz assessment, online webinar to introduce key themes, pre-reading assignment, a case study and finally a highly interactive discussion group. It is an engaging, dynamic format tailored around a range of topical SMSF issues, with a central theme of value and relevance. The travelling Masterclass Series is held annually in Adelaide, Melbourne, Sydney, Brisbane and Perth, facilitating in-depth, face to face technical discussions.

### SMSF Association Intensive Series

The SMSF Association Intensive Series consists of a three hour workshop that investigates the practical detail behind SMSF legislation, its impact on SMSFs and determinations made by the regulators. Strategies are examined through highly engaging discussion facilitated by a well-respected industry expert. The Australia-wide Intensive Series is conducted in a small professional group to help optimise learning and create dynamic Q&A forums.

### SMSF Association Local Communities

Run by members for members, these metro and regional based events include a range of learning and networking activities including seminars, debates and discussion groups. They provide a great forum for developing knowledge whilst extending your local SMSF professional networks.

### On Demand Learning - Webinars

Access a variety of webinars and on demand learning options presented by experts in the sector and keep up to date with the latest information. Take the opportunity to extend your SMSF knowledge, on a variety of different topics, at your own pace.



### Online Resource Library

The SMSF Association online Resource Library gives you access to hundreds of technical articles to assist you in your day to day practice, help you stay up to date, save time and provide the best SMSF advice and services.

Access a wide range of technical resources including:

#### **Go-To Guides**

Your practical guide to important topics made up of an explanatory paper, detailed case study examples, interactive checklist and white label document.

#### **White label documents**

Assisting you to communicate to your clients faster and save you time when a major change occurs. Brand this document and add your contact details to the bottom to organise a time with your clients to discuss in more detail.

#### **Q&As**

Have a burning question? View our Q&A library to uncover answers to important SMSF questions.

#### **Media releases and latest news**

Stay up to date on the latest SMSF Association media releases and latest news articles.

### Complimentary Professional Development

#### **Webinars**

As a member you have complimentary access to four SMSF legislative and regulatory webinars and the Federal Budget update webinar each year.

#### **Technically Speaking**

SMSF Association Technically Speaking publications are a highly popular technical deep dive into important SMSF topics. These publications are worth up to 1 CPD point (SMSF Association accredited) with the completion of the corresponding CPD exercise with a score of 60% or more.

#### **Technical Research Service**

Your membership includes access to our technical research service. Our Technical team can assist you with technical SMSF related queries by providing information in the form of published commentary, articles, legislation and similar resources.

Your membership includes three technical queries per membership year.

#### **CPD Compass**

Continuing Professional Development (CPD) is an important and necessary part of your SMSF career. The SMSF Association CPD Compass helps you choose the right CPD activities to best enhance your professional career. This online tool is designed to help you self-assess your SMSF skills and knowledge against industry standards, and steer your upcoming CPD activities to coincide with your professional development needs.

### Trustee Knowledge Centre

We are conscious that educating your SMSF clients particularly through periods of change is a continued commitment of your time and resources.

We are pleased to provide you with complimentary access to the Trustee Knowledge Centre as an important benefit of your professional membership.

The Trustee Knowledge Centre is an engaging education and information platform providing a range of education resources such as in depth learning modules, checklists, webinars, latest news, event details and up to date information on changes within the SMSF sector.

Access to the Trustee Knowledge Centre will:

- Educate and empower your clients to ask the right questions, investigate opportunities and seek your quality SMSF advice and services
- Save you time in educating your clients so you are able to focus on providing additional value-add services
- Save resources in compiling information for your clients
- Open potential opportunities as your client becomes more informed, which may lead to business growth

### Preferential membership for your clients

As a valued professional member, we invite you to utilise this resource in your day to day practice and pass on membership at the preferential price of \$77 per person (normally \$99) to your clients.

Contact the SMSF Association for enquiries regarding this preferential membership for your clients at [memberservices@smsfassociation.com](mailto:memberservices@smsfassociation.com)

### Embed independent education resources into your website

The Trustee Knowledge Centre resource library is available to be embedded into your own website as an integrated education portal to add value to your client services and online presence. To enquire about this education solution for your business, please contact us at [memberservices@smsfassociation.com](mailto:memberservices@smsfassociation.com)



**Contact:**  
[memberservices@smsfassociation.com](mailto:memberservices@smsfassociation.com)  
[smsfassociation.com](http://smsfassociation.com)

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