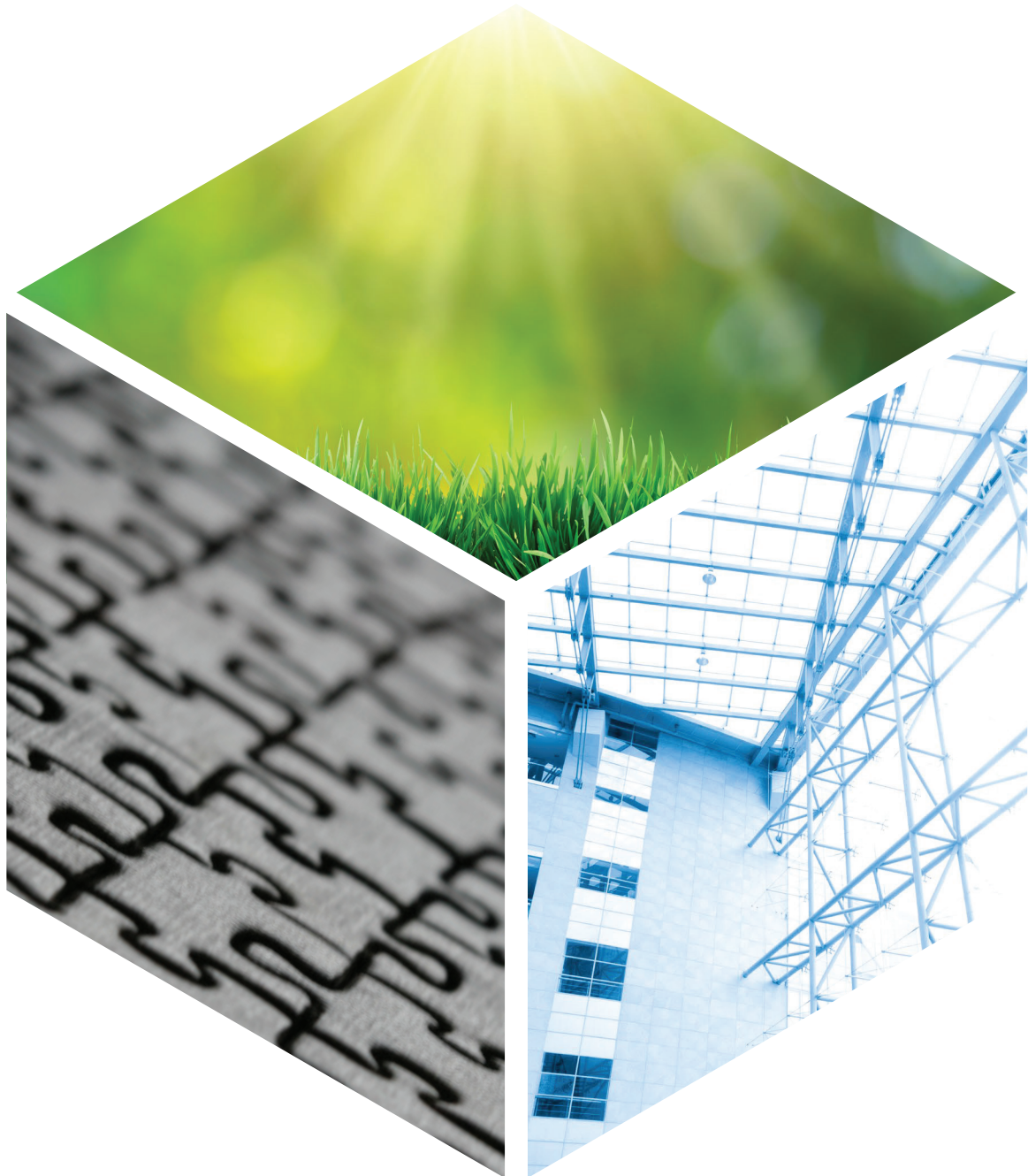


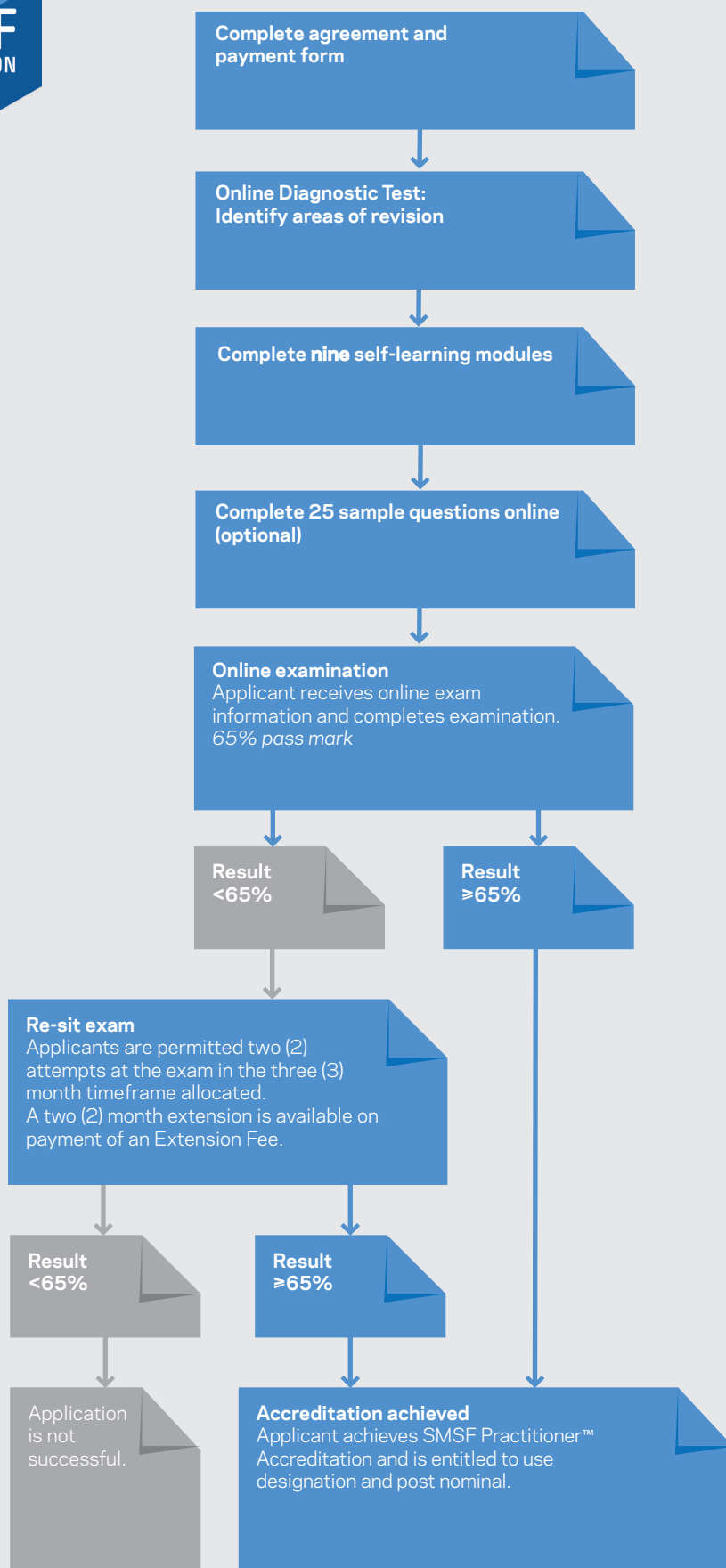
**Take the  
next step**

SMSF Association  
SMSF Practitioner™





## SMSF Practitioner Accreditation Process



### Schedule of fees (per member)

SMSF Practitioner	\$895
Accreditation & Certification	
Extension Fee (if required)	\$220

Prices quoted are GST inclusive

# What is the SMSF Association's SMSF Practitioner Accreditation?

The SMSF Association's SMSF Practitioner (SSP™) accreditation program and designation is designed to provide independent validation of an SMSF professional's foundation SMSF knowledge and practical skills.

The accreditation was established in direct response to growing requests from employers in the SMSF sector for a practical, foundation-based SMSF designation for their employees, whether they be financial planners, accountants, lawyers, auditors or any other service provider in the SMSF space.

Many individuals providing advice to SMSF trustees acquire their SMSF knowledge and skills through an array of different paths; formal studies, on the job or self-learning. This accreditation verifies the foundation SMSF knowledge that those providing SMSF advice should hold; it's an industry benchmark.

The SSP™ accreditation program has a very practical approach, which sets it apart from the Association's other Specialist (SSA™ and SSAud®) designations. The SMSF Practitioner (SSP™) program fits into a structure somewhat akin to what happens in other professions. In medicine, for example, there are GPs and specialists, while in the legal profession you have paralegals and lawyers. Under this analogy, professionals who earn an SSP™ designation could be seen as GPs or paralegals, while those with an SSA™ or SSAud® are considered a medical specialist or lawyer.

## Who can apply for SMSF Practitioner Accreditation?

Associate and Specialist Members are eligible to apply for accreditation as an SMSF Practitioner provided they meet the Association's Continuing Professional Development and Quality Review Program requirements.

The program provides an opportunity for those who want to take their first step in demonstrating their foundation SMSF knowledge and practical skills and is an excellent stepping stone towards the SMSF Specialist Advisor™ (SSA™) Accreditation.

## Program structure

Set at an AQF8 level, the SMSF Practitioner accreditation program examines a professional's SMSF competency via a 90 minute online multiple choice and short answer exam.

The accreditation program is designed to provide independent validation of your existing knowledge. The program includes:

- a. A Diagnostic self-assessment test that assists you 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.

## How do I get accredited?

To apply for SMSF Practitioner accreditation you will need to:

- Be an Associate or Specialist Member of the SMSF Association.
- Login to the SMSF Association website and access the SMSF Practitioner Accreditation Program Rules & Conditions.
- Download SMSF Practitioner brochure and complete agreement and payment form (back page) and submit with payment to the SMSF Association, or register online at; [www.smsfassociation.com](http://www.smsfassociation.com). On receipt, the Association will email you an accreditation information pack.
- Complete the Online Examination within 2 attempts.

## SMSF Practitioner Accreditation Exam

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

The online exam is 90 minutes in duration and is a multiple choice and short answer format. The exam is designed to have a very practical focus.

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 Education Centre which provides information on how to navigate the online exam environment.
- Access to a Diagnostic self-assessment test.
- Access to nine (9) self-learning modules
- 25 sample questions that enable you to refresh your knowledge and become familiar with the exam structure.

No further materials are provided as part of this accreditation program.

You will however require access to the Thomson Reuters "The Essential SMSF Guide" which is required reading.

## Time frames

Applicants must successfully complete the online exam **within three months** of entering the program.

If you do not successfully complete the program within the time frame specified above, you may apply for a maximum two month extension, paying the Extension Fee of \$220.

Failure to successfully complete the program **within five months** of entry into the program will result in your application being terminated and forfeiture of fees paid. Should you wish to re-enter the 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 the program.

# SMSF Practitioner Accreditation Agreement and payment form



## 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:	

## Payment details

<input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard	<input type="checkbox"/> Amex (attracts 1% surcharge)
Credit card no.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Expiry <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/>
Cardholder's name	CVV	<input type="text"/> <input type="text"/> <input type="text"/> <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 Practitioner™ (SSP™) 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.		
Name	Signature	Date

## Terms and Conditions

1. I acknowledge that the information provided to the SMSF Association for the purposes of Accreditation is true and correct.
2. I acknowledge that I have read and will abide by the SMSF Practitioner Accreditation Program SMSF Practitioner Rules and Conditions.
3. I acknowledge that by signing this written application I am entering into a contract for the member supply of Accreditation and independent Certification services.
4. 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.

5. I agree to provide any further information that will affect or influence the Accreditation status or Accreditation decision.
6. 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 SMSF Practitioner Rules and Conditions.

## Send this form to:

Email  
memberservices@smsfassociation.com  
Mail  
SMSF Association  
PO Box 3296 Rundle Mall  
Adelaide SA 5000

## For more information:

www.smsfassociation.com  
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08 8205 1900