

20 – 22 February
Melbourne

SMSF Association National Conference 2019

Strength
of determination



Conference
Program



Strength of integrity

Target Audience Legend

FP Financial Planners

ACC Accountants

AUD Auditors

ADMIN Administrators

LAW Lawyers

ALL All Delegates

Open from 7.30am	Exhibition Hall Open - Exhibition Centre, Door 7 (closed from 3:30pm - 5:45pm)				
8.00am – 10.00am	<p>SMSF Association: Thought Leadership Breakfast presented by BT Financial – Sovereign Room What role should SMSFs play in Australia's superannuation system? Michael Rice, Chief Executive Officer, Rice Warner, Andrew Inwood, Founder and Principal, CoreData, Eva Scheerlinck, CEO, AIST and John Maroney, CEO, SMSF Association. Facilitated by: Melinda Howes, General Manager - Superannuation, BT Financial Group</p>				
8.30am – 10.00am	<p>Pre-session 1: SMSF & Market Volatility - Plenary Room 1 Speakers from: MLC, State Street Global Advisors, La Trobe Financial, Macquarie, CommSec</p>	<p>Pre-session 2: SMSF Sector Outlook - Plenary Room 3 Speakers from: Intello, OpenInvest, Australian Unity, Class, SuperConcepts</p>			
10.15am – 10.30am	<p>Chair's Address – Plenary Room 2 Professor Deborah Ralston, Chair, SMSF Association</p>				
10.30am – 10.40am	<p>CEO's Address – Plenary Room 2 John Maroney, CEO, SMSF Association</p>				
10.40am – 10.45am	<p>Patron's Address – Plenary Room 2 Tim Costello, Patron, SMSF Association</p>				
10.45am – 11.40am	<p>Plenary Session 1 – Plenary Room 2 Your conference compass: hit the ground running with this Legs & Regs update Peter Hogan, Head of Education and Technical, SMSF Association and Peter Burgess, General Manager, Technical Services & Education, SuperConcepts</p>				
Stream	<p>Legs & Regs Plenary Room 3</p>	<p>Strategy Plenary Room 2</p>	<p>Practice Plenary Room 1</p>	<p>Audit Meeting room 220</p>	
12.00pm – 1.00pm	<p>Concurrent Session 1A ASIC Regulatory Update Kate Metz, Acting Senior Executive Leader, ASIC and Liam Shorte, Director, Verante Financial Planning</p> <p>FP</p>	<p>Concurrent Session 1B How many members is a good idea? Tim Miller, Miller Super Solutions and Graeme Colley, Executive Manager, SMSF Technical & Private Wealth, SuperConcepts</p> <p>FP/ACC/LAW</p>	<p>Concurrent Session 1C You've got to fight for the right to remain in SMSF Karen Dezdjek, Director - Wealth & Superannuation, and Olivia Long, Managing Director, Strategy and Operations - Wealth & Superannuation, both from Prime Financial Group Ltd</p> <p>ACC</p>	<p>Concurrent Session 1D Auditor best practice - a workshop examining our responsibilities in light of McGoldrick and Baumgartner Belinda Aisbett, Director, Super Sphere Pty Ltd, Heather Gray, Partner, Hall & Wilcox, Shirley Schaefer, Partner, BDO Audit (SA) Pty Ltd</p> <p>AUD</p>	
1.00pm – 1.55pm	Lunch - Exhibition Centre, Door 7				
1.55pm – 2.55pm	<p>Concurrent Session 2A The Other NDIS - Neutralising Disability in SMSFs Caroline Harley, Executive Manager - Strategic Advice Specialist, Commonwealth Private Office, CBA</p> <p>FP/ACC/LAW</p>	<p>Concurrent Session 2B The do's and don'ts of SMSF property development Phil Broderick, Principal, Sladen Legal</p> <p>ACC/FP/AUD</p>	<p>Concurrent Session 2C The how-to guide for a realistic, appropriate and compliant SOA Christina Kalantzis, Principal, Alexis Compliance & Risk Solutions Pty Limited</p> <p>FP/ACC</p>	<p>Workshop 2D Meeting room 220 Is your documentation up to it - the next frontier of SMSF and estate disputes Scott Hay-Bartlem, Partner, Cooper Grace Ward</p>	
2.55pm – 3.35pm	Afternoon Tea - Exhibition Centre, Door 7				
3.35pm – 4.35pm	<p>Concurrent Session 3A Getting ahead of FASEA - what do you need to do now? Peter Hogan, Head of Education and Technical, SMSF Association</p> <p>FP/ACC</p>	<p>Concurrent Session 3B Spouse equalisation strategies - is it worth it? Yvonne Chu, Head of Technical Services, Australian Unity</p> <p>FP/ACC</p>	<p>Concurrent Session 3C Obstacles in SMSF regulation: What affects technology in your practice? Shelley Banton, Executive General Manager, Technical Services, ASF Audits</p> <p>AUD</p>		
4.50pm – 5.40pm	<p>Plenary Session 2 – Plenary Room 2 Death, taxes and the Transfer Balance Cap Craig Day, Executive Manager, Technical Services, Colonial First State</p>				
5.45pm - 7.45pm	CommSec Welcome Reception - Exhibition Centre, Door 7				

Open from 7.30am		Exhibition Hall Open - Exhibition Centre, Door 7			
8.15am – 9.00am		Plenary Session 3 – Plenary Room 2 Challenges and opportunities facing SMSFs today Dr David Knox, Senior Partner, Mercer, Brad Cooper, Chief Executive, BT Financial Group, Jordan George, Head of Policy, SMSF Association and Professor Deborah Ralston, Chair, SMSF Association			
Stream	Legs & Regs Plenary Room 3	Strategy Plenary Room 2	Practice Plenary Room 1	Workshop Meeting room 220	Workshop Meeting room 219
9.20am – 10.20am	Concurrent Session 4A SMSF Case Law 2018 breakdown: how it applies in practice Rebecca van Langenberg, Special Counsel, Madgwicks Lawyers ALL	Concurrent Session 4B Pensions and the TBC - Issues and strategies for our new normal Jemma Sanderson, Director, Cooper Partners Financial Services ALL	Concurrent Session 4C Ethical decision-making: a scenario-based look at how the FASEA code could apply in practice Dr Deen Sanders OAM, Partner - Ethics & Professionalism, & Dennis Gentilin, Director, Governance, Regulation & Conduct, Deloitte FP	Workshop 4D Is your documentation up to it - the next frontier of SMSF and estate disputes Clinton Jackson, Partner, Cooper Grace Ward	Workshop 4E Getting money into super using small business CGT concessions Darren Wynen, Director, Insyt Pty Ltd
10.20am – 11.00am		Morning Tea - Exhibition Centre, Door 7			
11.00am – 12.00pm	Concurrent Session 5A Gnarly about NALI - the changes and impacts on SMSFs Nicholas Ali, Executive Manager, SMSF Technical Support, SuperConcepts ACC/FP/AUD	Concurrent Session 5B When contributions become Supercalifragilisticexpialidocious Bryan Ashenden, Head of Financial Literacy & Advocacy, BT Financial Group ACC/FP/AUD	Concurrent Session 5C Practically Pensions in Every Way... Jemma Sanderson, Director, Cooper Partners Financial Services ACC/FP		
12.00pm – 12.55pm		Lunch - Exhibition Centre, Door 7			
1.00pm – 2.00pm	Concurrent Session 6A Related Parties: who are they? And just as importantly, who aren't they? And why do we care? Leigh Mansell, Director, SMSF Technical & Education Services, Heffron SMSF Solutions ACC/FP/AUD	Concurrent Session 6B SMSFs and defined benefits pensions - the ticking time bomb Mark Ellem, Executive Manager, SMSF Technical Services, SuperConcepts and Doug McBirnie, General Manager, Accurium ACC/FP/AUD	Concurrent Session 6C Frailty risk - an approach to designing better SMSF portfolios Louise Biti, Director, Aged Care Steps ACC/FP	Workshop 6D Is your documentation up to it - the next frontier of SMSF and estate disputes Scott Hay-Bartlem, Partner, Cooper Grace Ward	Workshop 6E Getting money into super using small business CGT concessions Darren Wynen, Director, Insyt Pty Ltd
2.10pm – 3.10pm	Concurrent Session 7A Litigation Liability Floodgate is Open; is your SMSF client checklist robust or so so? Peter Bobbin, Managing Principal, Argyle Lawyers FP/ACC	Concurrent Session 7B Dealing with reserves in an SMSF - are they in the starting line up or left on the bench? Mark Ellem, Executive Manager, SMSF Technical Services, SuperConcepts and Craig Day, Executive Manager, Technical Services, Colonial First State ACC/FP/AUD	Concurrent Session 7C Structuring portfolios for maximum investment returns in the absence of franking credits Simon Doyle, Schroders, Bhanu Singh, Dimensional Fund Advisors, Vihari Ross, Magellan Asset Management, James Kingston, Blackrock Chairperson: Robin Bowerman, Vanguard Australia FP/ACC		
3.10pm – 3.50pm		Afternoon Tea - Exhibition Centre, Door 7			
3.50pm – 4.45pm		Plenary Session 4 – Plenary Room 2 A regulatory update on practical issues within SMSFs Dana Fleming, Assistant Commissioner, SMSF Segment, Australian Taxation Office			
4.45pm – 5.00pm		Address by Stephen Glenfield, Chief Executive Officer, FASEA - Plenary Room 2			
5.00pm – 5.45pm		Plenary Session 5 – Plenary Room 2 Overcoming the barriers to Innovation, presented by James O'Loughlin			
5.45pm – 7.30pm		Schroders Networking Function			

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8.15am – 9.05am		Plenary Session 6 – Plenary Room 2 What does the Royal Commission mean for financial services in Australia? The Hon Bernie Ripoll, Director, SAS Group, Jeremy Cooper, Chairman, Retirement Income, Challenger Limited and James Kirby, Wealth Editor, The Australian			
9.05am – 9.15am		Special Address – Plenary Room 2 Hon. Stuart Robert MP, Assistant Treasurer			
Stream	Legs & Regs Plenary Room 3	Strategy Plenary Room 2	Business Practicum Meeting room 212 & 213	Workshop Meeting room 220	Workshop Meeting room 219
9.30am – 10.20am	Concurrent Session 8A The ultimate guide to understanding ECPI and segregation Melanie Dunn, SMSF Technical Services Manager, Accurium ACC/FP/AUD	Concurrent Session 8B Structuring Investment Options - How to read your client Peter Fry, Director - Wealth and Superannuation, Peter Fry & Associates ACC/FP	Concurrent Session 8C Business Practicum - How prepared are you for the future of SMSF? Aaron Dunn, CEO, Smarter SMSF ACC	Workshop 8D Is your documentation up to it - the next frontier of SMSF and estate disputes Clinton Jackson, Partner, Cooper Grace Ward	Workshop 8E Getting money into super using small business CGT concessions Darren Wynen, Director, Insyt Pty Ltd
10.20am – 10.55am		Morning Tea - Exhibition Centre, Door 7			
10.55am – 11.45am	Concurrent Session 9A Has your client actually retired? The 5 things everyone gets wrong, and everything you need to master this vital question Bryce Figot, Special Counsel, DBA Lawyers ALL	Concurrent Session 9B Strategies to maximise ECPI on client's assets Melanie Dunn, SMSF Technical Services Manager, Accurium and Chris Morcom, Director / Private Client Adviser, Hewison Private Wealth FP/ACC	Concurrent Session 9C Business Practicum - The key ingredients to building a successful modern SMSF practice Aaron Dunn, CEO, Smarter SMSF ACC		
11.55am – 12.25pm		Plenary Session 7 - Plenary Room 2 Conference wrap-up Peter Hogan, Head of Education and Technical, SMSF Association, Scott Hay-Bartlem, Partner, Cooper Grace Ward and Craig Day, Executive Manager, Technical Services, Colonial First State			
12.25pm – 12.30pm		Awards Ceremony - Plenary Room 2			
12.30pm – 12.45pm		Closing Address - Plenary Room 2 Robin Bowerman, Vice-Chairman, SMSF Association			
1.00pm – 2.30pm		Charter Hall Final Day Luncheon - Melbourne Room Keynote speaker: Dr. Richard "Harry" Harris SOC OAM, Thailand cave rescue diver, Australian of the Year 2019			