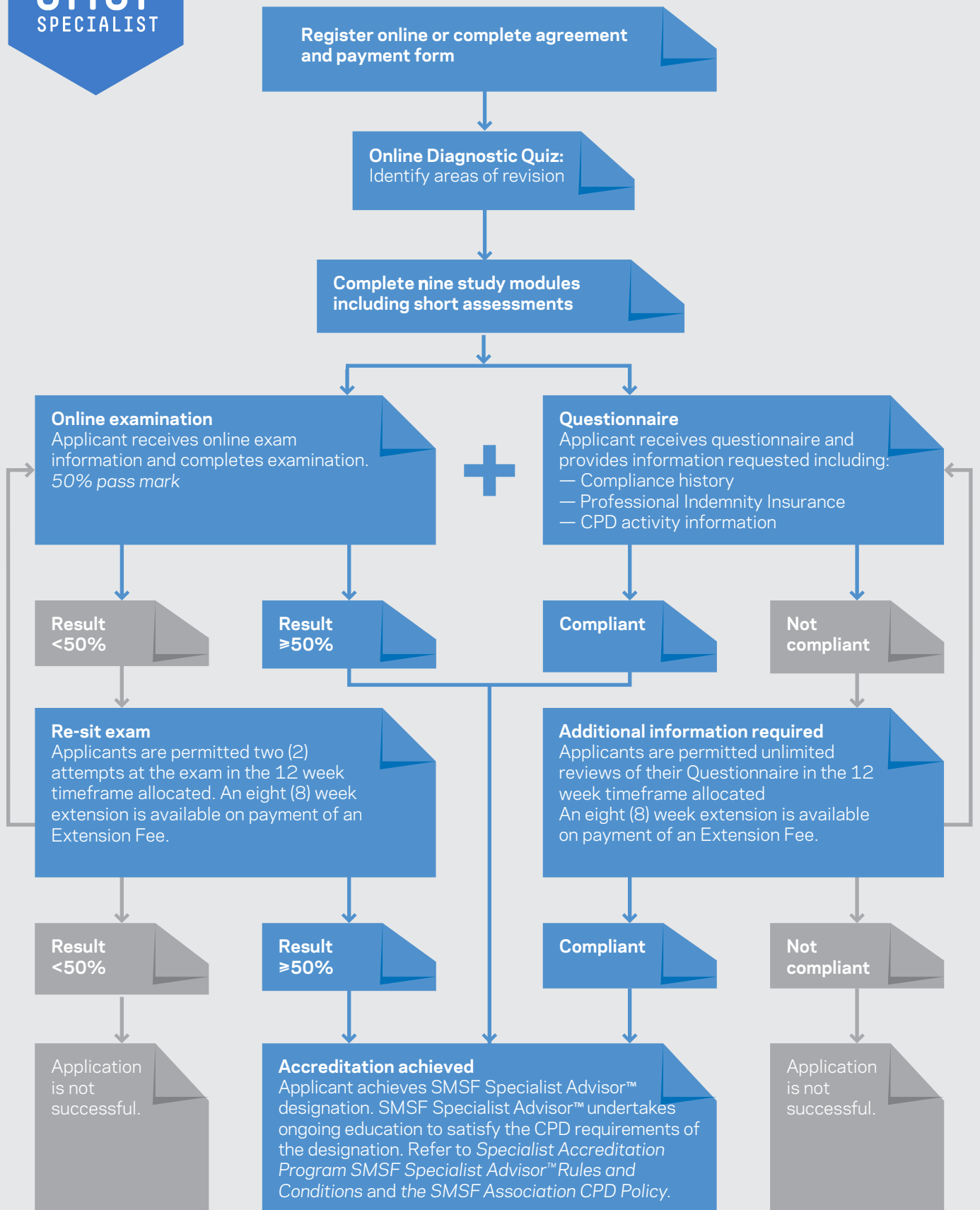


**Take the
next step**
SMSF Specialist
Advisor™





Accreditation Process



Schedule of fees (per member)

SMSF Specialist Advisor	\$1,695
Accreditation & Certification	
Extension Fee (if required)	\$220

Prices quoted are GST inclusive

What is the SMSF Association Accreditation Program?

The SMSF Association is the peak professional body representing SMSF professionals and the SMSF sector in Australia.

The SMSF Association has developed an accreditation program to ensure professional standards are achieved and maintained by practitioners specialising in the provision of services to the SMSF sector. This is the first program in Australia to offer independent certification of an advisor from either the wholesale or retail sectors and offers a verification of a practitioner's competence, independence, experience and knowledge.

Through accreditation, Specialist Members demonstrate they have attained the benchmark set by the Association and can brand and promote their specialisation in the marketplace.

SMSF Association Specialists:

- are recognised by peers as having comprehensive specialist SMSF skills and knowledge;
- have made a professional commitment to maintaining currency and compliance with legislation; and
- are able to show professionalism in conducting services in the SMSF Industry.

The **SMSF Specialist Advisor™ (SSA™)** accreditation is for SMSF professionals, including but not limited to; accountants, auditors, financial planners, administrators, lawyers, educators, estate planners, actuaries and strategists seeking recognition for their SMSF skills and knowledge as well as knowledge of the SIS, Tax and Corporations Law.

Who can apply for SMSF Specialist Advisor accreditation?

Associate Members are eligible to apply for accreditation as an SMSF Specialist Advisor. The SMSF Association recommends that Associate Members should meet the following criteria prior to entering the program:

- Have a minimum two (2) years' experience providing advice and/ or services to the retail or wholesale SMSF sector.
- SMSF related work activities should account for, or be growing towards a minimum of 10% of total workload.

SMSF Specialist Advisor Program Components

1. Diagnostic Quiz

The Diagnostic quiz provides a self-assessment of all knowledge areas covered in the online SSA exam. Your responses to the questions in the Diagnostic quiz will assist you with identifying those knowledge areas that may need additional attention to build your SMSF knowledge prior to completing the online exam.

2. Study Modules

There are nine (9) study modules that participants are required to complete as preparation for the SSA exam. Each study module provides a range of resources which may include required text, recommended reading, online resources, online webinars and relevant technical reports.

A short assessment on conclusion of each study module must be successfully completed, in order to access the following study module. All nine modules must be successfully completed before gaining access to the SSA exam.

3. SSA Examination

The SSA exam is conducted under supervision and the participant is required to nominate a suitable supervisor who meets the Association's eligibility criteria.

The SSA exam duration is 2 hours and is conducted online and is open-book. The exam consists of 90 multiple choice questions – no written answers are required.

Participants are permitted a maximum of two (2) attempts to successfully complete the online exam.

4. Questionnaire

This short questionnaire tests and verifies your adherence to the SMSF Specialist Advisor Program Eligibility Criteria. You are required to provide details of your compliance history and record details of your CPD Activities. The SMSF Association will review your completed questionnaire and analyse CPD information provided.

Program Timeframes

You are required to successfully complete both the Online Exam and Questionnaire within **twelve weeks** of entering the program.

If you are unable to successfully complete the Specialist Accreditation Program within the required timeframe specified above, you may apply for a maximum **eight week extension**, paying the Extension Fee of \$220.

If you are unable to successfully complete both components within **twenty weeks** of entry into the program it will result in your application being terminated, forfeiture of fees paid and results already earned. Should you wish to re-enter the Specialist 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 both components of the Program.

CPD Hours

The SMSF Specialist Advisor program has been assessed for a total of 47 SMSF Association and FASEA CPD hours.



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

Program cost - \$1,695

Payment details

<input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard	<input type="checkbox"/> Amex
Credit card no.	<input type="text"/>	Expiry <input type="text"/> / <input type="text"/>
Cardholder's name	CVV	<input type="text"/>
Signature		
Total charged AUD\$ 1,695.00	Date	
<input type="checkbox"/> Direct deposit (BSB: 033-113; Acc: 191756)	<input type="checkbox"/> Cheque (payable to SMSF Association)	

Declaration—Accreditation designation

I confirm I am applying for the SMSF Specialist Advisor™—SSA™ 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
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Terms and Conditions

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

- I agree to provide any further information that will affect or influence the Accreditation status or Accreditation decision.
- 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 Specialist Accreditation Program SMSF Specialist Advisor™ 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:

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