

19 - 21
FEBRUARY



SMSF
ASSOCIATION

2020
NATIONAL CONFERENCE

GOLD
COAST

CONFERENCE
PROGRAM

Join us in 2020 as we shine a light on the latest SMSF topics and complex technical issues covering legislation and regulation, strategy, advice, business practice, Regulators and more...

TARGET AUDIENCE LEGEND

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|-------|--------------------|
| FP | FINANCIAL PLANNERS |
| ACC | ACCOUNTANTS |
| AUD | AUDITORS |
| ADMIN | ADMINISTRATORS |
| LAW | LAWYERS |
| ALL | ALL DELEGATES |



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| Open from 7:30am | Exhibition Hall Open | | | | |
| 8:00am - 10:00am | Thought Leadership Breakfast presented by BT — Central Room A SMSF and superannuation landscape in 2030 Panellists: Jeremy Cooper, Chairman, Retirement Income, Challenger Limited, Michael Blomfield, CEO, Investment Trends, Michael Rice, Executive Director, Rice Warner and John Maroney, CEO, SMSF Association. Facilitated by: Melinda Howes, General Manager – Superannuation, BT | | 8:15am - 10:15am | Specialist Only Session — Arena 2 Carrying on a business in an SMSF Bryce Figot, Special Counsel, DBA Lawyers | |
| 10:15am - 10:45am | Morning Tea — Exhibition Hall 1 & 2 | | | | |
| 10:45am - 10:55am | Chair Address and Board Introduction — Arena 2 | | | | |
| 10:55am - 11:15am | Special Address — Arena 2 Senator the Hon Jane Hume, Assistant Minister for Superannuation, Financial Services and Financial Technology | | | | |
| 11:15am - 12:00pm | Plenary Session 1 — Arena 2 Your conference compass: Hit the ground running with this Legs & Regs update Peter Burgess, General Manager, Technical Services & Education, SuperConcepts | | | | |
| STREAM | LEGS & REGS Arena 1B | STRATEGY Arena 2 | ADVICE, PRACTICE & REGULATORY Arena 1A | AUDITOR SESSION Room 5 & 6 | |
| 12:15pm - 1:15pm | Concurrent Session 1A Having 2020 vision at age 65 Bryan Ashenden, Head of Financial Literacy & Advocacy, BT FP, ACC, ADMIN, LAW | Concurrent Session 1B Alternative investment vehicles Daniel Smedley, Principal, Sladen Legal FP, ACC | Concurrent Session 1C AFCA and decision-making through a lens of fairness Dr June Smith, Deputy Chief Ombudsman, Australian Financial Complaints Authority (AFCA) FP | Concurrent Session 1D Current audit considerations Belinda Aisbett, Director, Super Sphere Pty Ltd AUD, ACC | |
| 1:15pm - 2:05pm | Lunch — Exhibition Hall 1 & 2 | | | | |
| 2:05pm - 3:05pm | Concurrent Session 2A The Transfer Balance Cap 2 years on... Yvonne Chu, Head of Technical and Professional Development, Australian Unity FP, ACC, ADMIN | Concurrent Session 2B SMSFs investing in related vehicles Phil Broderick, Principal, Sladen Legal FP, ACC, LAW | Concurrent Session 2C Getting SMSF advice right Neil Sparks, National Manager SMSF Strategy, BT FP | WORKSHOP Room 5 & 6 Workshop 2D Dealing with death - Better the devil you know! Leigh Mansell, Director, SMSF Technical & Education Services, Heffron SMSF Solutions | WORKSHOP Room 7 & 8 Workshop 2E Ageing clients, advice and ethics Louise Biti, Director, Aged Care Steps |
| 3:05pm - 3:45pm | Afternoon Tea — Exhibition Hall 1 & 2 | | | | |
| 3:45pm - 4:45pm | Concurrent Session 3A The next frontier of SMSF and estate disputes Clinton Jackson, Partner, Cooper Grace Ward Lawyers FP, ADMIN, LAW | Concurrent Session 3B Pensions: The past, the present and the future Mary Simmons, Technical Manager, SMSF Association FP, ACC, ADMIN | Concurrent Session 3C Navigating the ethical path in the new advice world Craig Day, Executive Manager, Technical Services, Colonial First State, Nidal Danoun, Principal Director, Prosperity Financial Services and Tracy Wilcox, Associate Professor, UNSW FP | ALL | ALL |
| 5:00pm - 5:45pm | Plenary Session 2 — Arena 2 Conflicts in SMSFs - Estate planning & conflict - What have the cases taught us? Scott Hay-Bartlem, Partner, Cooper Grace Ward Lawyers | | | | |
| 5:45pm - 7:45pm | La Trobe Financial Welcome Reception — Exhibition Hall 1 & 2 | | | | |

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| 7:30am - 8:45am | Audit Discussion Group Breakfast — Rooms 5 & 6 Belinda Aisbett, Director, Super Sphere Pty Ltd, Katrina Fletcher, Director, Elite Super and Kellie Grant, Director, SMSFs Approved Auditors Portfolio Superannuation, Australian Taxation Office | | | | |
| Open from 8:00am | Exhibition Hall Open | | | | |
| 9:00am - 10:00am | Plenary Session 3 — Arena 2 The contribution strategy landscape in 2020 Meg Heffron, Managing Director, Heffron | | | | |
| 10:00am - 10:40am | Morning Tea — Exhibition Hall 1 & 2 | | | | |
| STREAM | LEGS & REGS Arena 1B | STRATEGY Arena 2 | ADVICE, PRACTICE & REGULATORY Arena 1A | WORKSHOP Room 5 & 6 | WORKSHOP Room 7 & 8 |
| 10:40am - 11:40am | Concurrent Session 4A Managing the SMSF liquidity problem Natasha Panagis, Technical Manager, AIA Australia FP, ACC | Concurrent Session 4B The small business CGT concessions and super – The practical aspects Darren Wynen, Director, Insyt Pty Ltd FP, ACC | Concurrent Session 4C A regulatory update from the ATO on practical issues with SMSFs Dana Fleming, Assistant Commissioner-SMSF Segment, Australian Taxation Office ALL | Workshop 4D Dealing with death - Better the devil you know! Leigh Mansell, Director, SMSF Technical & Education Services, Heffron SMSF Solutions ALL | Workshop 4E Ageing clients, advice and ethics Louise Biti, Director, Aged Care Steps ALL |
| 11:50am - 12:50pm | Concurrent Session 5A All things LRBAs William Fettes, Senior Associate, DBA Lawyers FP, ACC, LAW | Concurrent Session 5B CGT & ECPI - 3 years on Melanie Dunn, Head of Technical Services, Actuary, Accurium ACC, AUD | Concurrent Session 5C Compliant SMSF Advice - What does this look like? Christina Kalantzis, Financial Services Compliance, Alexis Compliance & Risk Solutions Pty Limited FP | | |
| 12:50pm - 1:40pm | Lunch — Exhibition Hall 1 & 2 | | | | |
| 1:40pm - 2:40pm | Concurrent Session 6A SMSF residency issues Jemma Sanderson, Director, Cooper Partners Financial Services FP, ACC, LAW | Concurrent Session 6B Venture into SMSF property development Tim Miller, Education Manager, SuperGuardian FP, ACC | Concurrent Session 6C TPB happenings Julie Berry, TPB Board Member, Tax Practitioners Board FP, ACC | Workshop 6D Auditor workshop Shelley Banton, Head of Technical, ASF Audits and Katrina Fletcher, Director, Elite Super | Workshop 6E Repurposing Sole Purpose Craig Day, Executive Manager, Technical Services, Colonial First State and Mark Ellem, Executive Manager, SMSF Technical Services, SuperConcepts |
| 2:40pm - 3:20pm | Afternoon Tea — Exhibition Hall 1 & 2 | | | | |
| 3:20pm - 4:20pm | Concurrent Session 7A Family breakdown & TBC issues Daniel Butler, Director, DBA Lawyers FP, LAW | Concurrent Session 7B All things SMSF tax administration Brooke Hepburn-Rogers, Director, Stellar Super ACC, ADMIN | Concurrent Session 7C Values ² - Ethics for competitive advantage Professor Melinda Edwards, Professor of Practice, QUTeX ALL | | |
| 4:30pm - 4:50pm | Special Address — Arena 2 Stephen Jones MP, Shadow Assistant Treasurer & Shadow Minister for Financial Services | | | | |
| 4:50pm - 5:45pm | Plenary Session 4 — Arena 2 The case for character Michael McQueen, Speaker, Trend Forecaster, Author | | | | |
| 5:45pm - 7:45pm | Allianz Retire+ Networking Function — Exhibition Hall 4 | | | | |

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| STREAM | LEGS & REGS Arena 1B | STRATEGY Arena 2 | ADVICE, PRACTICE & REGULATORY Arena 1A | | |
| 8:30am - 9:30am | Concurrent Session 8A Who do you think they are? Caroline Harley, Executive Manager - Strategic Advice Specialist, Commonwealth Private Office, CBA | Concurrent Session 8B Wind up an SMSF Peter Crump, Private Client Adviser, AMP Advice | Concurrent Session 8C Understanding the SMSF environment map Aaron Dunn, CEO & Co-Founder, Smarter SMSF | | |
| | FP, LAW | FP, ACC, ADMIN | ALL | 9:40am - 11:55am | 9:40am - 11:55am |
| | | | | WORKSHOP Room 5 & 6 | WORKSHOP Room 7 & 8 |
| 9:40am - 10:40am | Concurrent Session 9A The pension advice pickle - How has advice to establish an ABP become so diverse? Adam Goldstien, Advisor, Skeggs Goldstien | Concurrent Session 9B Business owners: their SMSF and related succession issues Jon de Fries, Senior Consultant - Succession Advice, MLC Advice | Concurrent Session 9C Defining value in your SMSF business model Aaron Dunn, CEO & Co-Founder, Smarter SMSF | Workshop 8D Dealing with death - Better the devil you know! Lyn Formica, Head of SMSF Technical & Education Services, Heffron SMSF Solutions | Workshop 8E Repurposing Sole Purpose Craig Day, Executive Manager, Technical Services, Colonial First State and Mark Ellem, Executive Manager, SMSF Technical Services, SuperConcepts |
| | FP | FP, LAW | ALL | | |
| 10:40am - 11:15am | Morning Tea — Exhibition Hall 1 & 2 | | | ALL | ALL |
| 11:15am - 11:45am | Plenary Session 5 — Arena 2 ATO & SMSF Association - Future direction James O'Halloran, Deputy Commissioner-Superannuation, Australian Taxation Office and John Maroney, CEO, SMSF Association | | | | |
| 11:45am - 12:35pm | Plenary Session 6 — Arena 2 Conference wrap-up Peter Hogan, Head of Technical, SMSF Association, Craig Day, Executive Manager, Technical Services, Colonial First State and Scott Hay-Bartlem, Partner, Cooper Grace Ward Lawyers | | | | |
| 12:35pm - 12:55pm | Closing Address — Arena 2 | | | | |
| 1:10pm - 2:30pm | Charter Hall Final Day Luncheon — Exhibition Hall 3 James Castrission and Justin Jones, Two Aussie explorers constantly pushing the boundaries of human endurance. | | | | |