

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

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



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; John Maroney, CEO, SMSF Association and Michael Rice, Executive Director, Rice Warner. 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	Concurrent Session 1B Alternative investment vehicles Daniel Smedley, Principal, Sladen Legal FP, ACC, LAW	Concurrent Session 1C AFCA and decision-making through a lens of fairness Ian Donald, 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				

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	Workshop 4E Ageing clients, advice and ethics Louise Biti, Director, Aged Care Steps
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	ALL	ALL
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	AUD	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				

Open from 7:30am	Exhibition Hall Open					
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	WORKSHOP Room 5 & 6	9:40am - 11:55am 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.					