

# SMSF Association

CPD Accreditation Training Programs

Validation. Credibility. Differentiation.



*Together we're building SMSF professionals*



Self Managed  
Super Fund  
Association

# SMSF ASSOCIATION CPD ACCREDITATION

The self managed super fund sector is a dynamic area of the financial services industry.

As SMSF regulations and the market as a whole continue to evolve to keep up with the sector's remarkable growth, specialist SMSF education and training has never been more critical for professionals in the industry. This presents educators with new opportunities to meet the increasing demand for independently accredited SMSF training programs.

The SMSF Association is dedicated to lifting the standard of professional SMSF advice and has developed a CPD Accredited Training Program to validate the SMSF education in the marketplace.

The SMSF Association's CPD Accreditation gives professionals confidence that their continuing professional development (CPD) activities meet the high standards of Australia's peak SMSF body.

The SMSF Association's CPD Accreditation provides educators with industry recognition and a range of benefits designed to help develop, run and promote quality educational programs.

Apply now to have your SMSF training program accredited by the SMSF Association and reap the benefits of the Association's independent validation.



# ABOUT THE SMSF ASSOCIATION

The SMSF Association is recognised as the peak body for professional advisors and the leading association within the self-managed super fund industry in Australia.

We are unique because:

- Our membership is multi-disciplinary, with SMSFs the common denominator
- Our members are highly engaged and passionate about the SMSF industry

Our membership is represented by the following occupations:

Financial Planner	40%
Accountant/Tax Agent	40%
Other	10%
Auditor	4%
Lawyer	3%
Administrator	3%

Our focus is on raising the standard of advice provided by professionals within the sector.

We do this by:

1. Enhancing education opportunities for SMSF professionals
2. Developing expert technical content for our members
3. Advocating to government and the regulators for the betterment of the industry
4. Providing independent validation of education programs
5. Awarding industry designations which personify excellence in SMSF knowledge.

# BENEFITS OF SMSF ASSOCIATION CPD ACCREDITATION

The SMSF Association's CPD Accreditation provides external SMSF training programs with:

## Validation

Receive validation that your education materials and resources are aligned to the SMSF Association's education standards and industry-defined curriculum.

## Credibility

Enhance the credibility of your SMSF training program by aligning with a brand that industry professionals know, trust and respect.

## Differentiation

Distinguish your training program from that of your competitors, with CPD accreditation that SMSF Association members and other industry professionals seek out an endorsement of quality.

## Entitlements

- Award SMSF Association CPD hours to participants who successfully complete your training program.
- Be included on the SMSF Association Accredited Education web page with a link to your event registration page.

The SMSF Association's CPD Accreditation assessment is conducted in accordance with the Association's CPD Policy and Education Standards.

## SMSF Association Education Standards

The SMSF Association has consulted with a wide range of SMSF Practitioners, Regulators and Trustees to determine the required content of SMSF education.

The SMSF Association Education Standards outline ten knowledge areas which ensure the provision of good SMSF Advice.

The knowledge areas relate to matters that include: Audit, Strategy, Trust Deeds, Benefit Payments, Practice Management, Estate Planning, Contributions, SMSF Administration, Managed Investments, Taxation and Ethics.

## Who can apply for SMSF Association CPD Accreditation?

We welcome all providers of SMSF CPD training to have their program assessed for CPD hours, including:

- Registered training organisations
- Higher education institutions
- Industry associations
- Subject matter experts
- SMSF practitioners
- Publications and media outlets
- Research houses
- Financial institutions
- Licensees

# ASSESSING YOUR PROGRAMS

## How do we assess your programs for SMSF Association Accreditation?

The awarding of CPD is done in line with the CPD Policy and Education Standards. The SMSF Association CPD Policy can be found [here](#).

### The following outlines the SMSF Association education standards that are applied:

- 1A - Introduction to Superannuation and Self-Managed Superannuation Funds
- 2A - Establishing a Self-Managed Superannuation Fund
- 3A - Identify and Develop Investment Objectives and Strategies
- 4A - Identify and advise on taxation requirements for Self-Managed Superannuation
- 5A - Manage the administration and operational requirements of Self-Managed Super Funds to meet compliance obligations.
- 6A - Understand and apply all relevant legislation and case law, and all regulatory body interpretation of the law.
- 7A - Products managed within Self-Managed Superannuation Funds
- 8A - Competencies and Professional Requirements for SMSF Practitioners

You are required to submit with your application the following resources to support the CPD review process:

1. Marketing materials
2. PD Agenda/timetable
3. Link(s) to the marketing of the PD program
4. Biography of the presenter(s) demonstrating SMSF and content expertise
5. PowerPoint slides demonstrating how the content will be delivered with notes (if applicable)
6. Resources including handouts provided, quizzes or assessments undertaken
7. Link to the recording in the case of webinars
8. Link and access to online education materials
9. Evidence of the quality review process that your organisation uses for program materials and assessment
10. A copy of the participant feedback form

Your PD program is independently reviewed and benchmarked against the SMSF Association education standards, together with the FASEA CPD categories and standards.

CPD hours are awarded for the duration of each PD program where they meet the SMSF Association education standards.

The PD program is then awarded SMSF knowledge area (where applicable to each session), together with CPD hours in line with the SMSF Association CPD policy.

It is also awarded FASEA CPD categories (if applicable) and FASEA CPD hours where appropriate.

A CPD Accreditation Report is then issued to the organisation which provides the approval code and any special conditions (if applicable), together with the details of how the CPD has been awarded to PD program.

### Conditions of CPD accreditation

When marketing the PD program, you must base this on the CPD accreditation report provided by the SMSF Association.

When issuing the CPD certificates at the completion of the program, you must include the accreditation approval code and also the appropriate CPD hours depending on the participants' attendance. Full records must be kept of the CPD certificates issued.

In line with FASEA standards, you **must** provide an overview of the PD program together with learning outcomes for each session.

# SMSF ASSOCIATION CPD ACCREDITED TRAINING PROGRAM APPLICATION FORM



Self Managed  
Super Fund  
Association

Please return this form via email to: [education@smsfassociation.com](mailto:education@smsfassociation.com)

## Application details

Application Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_

Position Title: \_\_\_\_\_ Email: \_\_\_\_\_

Organisation & Address: \_\_\_\_\_

## Application details

Program details: \_\_\_\_\_

Presenter/s Name, Title & Company: \_\_\_\_\_

Course Date(s): \_\_\_\_\_ Website: \_\_\_\_\_

## Program Type

Please select an option:

Length of program / activity	Cost (incl GST)
Up to 4.75 hours	\$260 per hour
4.75 - 20 hours	\$220 per hour
20 hours or more	\$200 per hour

\*All accreditations are valid for 12 months from date of issue.

## Where is your training being held?

Please tick an option:

- |   |                                       |                                       |  |
|---|---------------------------------------|---------------------------------------|--|
| <input type="checkbox"/> All of Australia | <input type="checkbox"/> Hobart       | <input type="checkbox"/> WA regional  | <input type="checkbox"/> ACT                                       |
| <input type="checkbox"/> Sydney           | <input type="checkbox"/> TAS regional | <input type="checkbox"/> Darwin       | <input type="checkbox"/> Anywhere as the course is online/distance |
| <input type="checkbox"/> NSW regional     | <input type="checkbox"/> Adelaide     | <input type="checkbox"/> NT regional  |  |
| <input type="checkbox"/> Melbourne        | <input type="checkbox"/> SA regional  | <input type="checkbox"/> Brisbane     |  |
| <input type="checkbox"/> VIC regional     | <input type="checkbox"/> Perth        | <input type="checkbox"/> QLD regional |  |

## Is there an entry requirement for attendees?

Please tick an option:  Yes  No  If yes, what is it? \_\_\_\_\_

## What knowledge level is your program pitched at?

- Emerging (participants who consider themselves on the upward learning curve)  
 Experienced (participants who feel they know enough but would like to gain a deeper understanding of the specifics)  
 Expert (participants who know most things, so it's really about keeping abreast of changes)

## What SMSF content does your program cover?

- |   |  |
|---|--|
| <input type="checkbox"/> New Funds            | <input type="checkbox"/> Audit           |
| <input type="checkbox"/> SMSF Administration  | <input type="checkbox"/> Estate Planning |
| <input type="checkbox"/> Contributions        | <input type="checkbox"/> Strategy        |
| <input type="checkbox"/> Managing Investments |  |
| <input type="checkbox"/> Taxation             |  |
| <input type="checkbox"/> Benefit Payments     |  |
| <input type="checkbox"/> Winding Up           |  |
| <input type="checkbox"/> Practice Management  |  |

## Program Evidence

**Please ensure the following documents are attached.**

### All programs:

- A timetable or agenda of the program with duration, title and description of each session identified
- A copy of the program notes/presentation
- Evidence of the developer/presenter's expertise in the topic (biographies, description of background in SMSFs/education, etc)
- Examples of marketing material for the program (brochure, weblinks, etc)

### Active assessment:

- If you are applying for an Active assessment, please also attach the following:
- A copy of the assessment (including instructions and duration)
- A copy of the evaluation form
- A copy of the marketing material used to promote this program
- Evidence/description of the quality review process for program materials and assessment

## Declaration Form

I, \_\_\_\_\_ (insert name), acting on behalf of \_\_\_\_\_ (insert company name) the legal entity providing the SMSF training program, hereby wish to apply for \_\_\_\_\_ (insert course title) to become CPD Accredited by the SMSF Association.

1. I certify that the organisation will:

- (a) Make no claim that any other program other than that listed above is accredited with the SMSF Association;
- (b) Not use this accreditation or any other accreditation documents in a misleading manner or in any way that could bring the SMSF Association into disrepute;
- (c) Participate in audits of this training program initiated by the SMSF Association;
- (d) Notify the SMSF Association in writing of any fundamental changes to the program.

2. I understand that this accreditation may not be awarded and/or may be rescinded if the organisation:

- (a) Fails to provide true and correct information of a material nature in this application; or
- (b) Fails to fulfill the undertakings outlined in point 1.

I agree     I do not agree

Date: \_\_\_\_\_

Invoice     Credit card payment:     Visa     Mastercard     AMEX

Card number: \_\_\_\_\_ Expiry date (mm/yy): \_\_\_\_\_

Cardholder's name: \_\_\_\_\_ CVV no.: \_\_\_\_\_

## Application process

### Step 1: Submit your activity

Once your program is developed, send a completed application form here, along with supporting materials, via email to [education@smsfassociation.com](mailto:education@smsfassociation.com) or via mail to  
SMSF Association  
CPD Accreditation,  
Level 9, 65 York Street Sydney  
NSW 2000

### Step 2: What next?

We will assess your program against our CPD Policy and Education Standards. If approved, you will receive an SMSF Association review report as outlined in entitlements.

If your program needs some modifications, we will provide you with feedback and recommendations.

**If you have any questions about the process, please contact Clair Bland, E-Learning Specialist on 02 8311 4183 or [clairbland@smsfassociation.com](mailto:clairbland@smsfassociation.com)**

