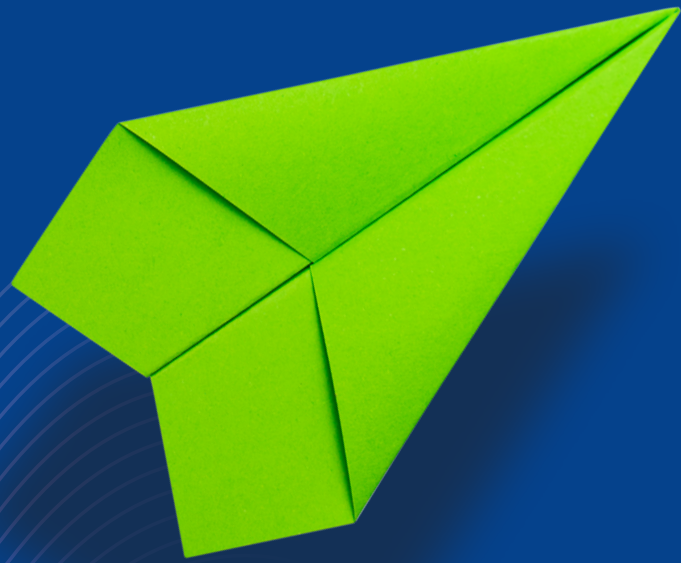




**NATIONAL  
CONFERENCE  
2022**



**VIRTUAL  
PROGRAM  
BROCHURE**

**ON-DEMAND SESSIONS**

Note: On-demand sessions will be available for viewing from 26 April to 3 June

<p><b>Welcome and Opening Addresses</b> Scott Hay-Bartlem, Chair, SMSF Association and John Maroney, CEO, SMSF Association</p>		
<p><b>Plenary 1</b> Your Conference compass: hit the ground running with this Legs &amp; Regs update Peter Burgess, Deputy CEO / Director of Policy &amp; Education, SMSF Association</p>		
<p><b>LEGS &amp; REGS</b> <b>Concurrent 1A</b> Related Party Definition - Separating the sheep from the goats Graeme Colley, Executive Manager Technical &amp; Private Wealth, SuperConcepts</p>	<p><b>STRATEGY</b> <b>Concurrent 1B</b> Pensions planning toolkit - A guide to executing the right pension for your clients Tim Miller, Education Manager SuperGuardian</p>	<p><b>ADVICE PRACTICE &amp; REGULATORY</b> <b>Concurrent 1C</b> Financial Services Law update - SMSF advice fee disclosures, sophisticated investor definition, DDOs, TMDs, PDSs and more Paul Derham, Managing Partner, Holley Nethercote</p>
<p><b>Concurrent 2A</b> The NALI/NALE whirlwind - Where are we at? Phil Broderick, Principal, Sladen Legal</p>	<p><b>Concurrent 2B</b> Protecting the family jewels - SMSF funding strategies &amp; asset protection Clinton Jackson, Partner, Cooper Grace Ward Lawyers</p>	<p><b>Concurrent 2C</b> Points and spreads: A new perspective on SMSF performance Ralf Zurbruegg, Professor of Finance &amp; Business Analytics, University of Adelaide Business School George Mihaylov, Lecturer in Finance, University of Adelaide Business School</p>
<p><b>Concurrent 3A</b> SMSF litigation update Bryce Figot, Special Counsel, DBA Lawyers</p>	<p><b>Concurrent 3B</b> Technicalities &amp; practicalities of Age Pension &amp; Aged Care advice for SMSF members Andrew Lowe, Head of Technical Services, Challenger</p>	<p><b>Concurrent 3C</b> Does your SMSF performance measure up? Lessons from the Your Future Your Super performance tables Philip La Greca, Executive Manager – SMSF Technical &amp; Strategic Solutions, SuperConcepts</p>

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	<p><b>LEGS &amp; REGS</b></p> <p><b>Concurrent 4A</b></p> <p>Getting particular about property - Leases, COVID relief, intermediary LRBAs</p> <p>Caroline Harley</p>	<p><b>STRATEGY</b></p> <p><b>Concurrent 4B</b></p> <p>Retirement strategies and sequencing risks - Are SMSFs up to the challenge?</p> <p>Melanie Dunn, Technical Services Manager, Accurium</p>	<p><b>ADVICE PRACTICE &amp; REGULATORY</b></p> <p><b>Concurrent 4C</b></p> <p>SMSF emerging issues - What the research says</p> <p>Emma Rosenzweig, Deputy Commissioner, Superannuation &amp; Employer Obligations, Australian Taxation Office</p>
	<p><b>Concurrent 5A</b></p> <p>Family law and super developments</p> <p>Stephen Bourke, Principal Solicitor, SuperSplitting</p>	<p><b>Concurrent 5B</b></p> <p>How to die correctly - Cascading and compliant BDBNs</p> <p>Matthew Burgess, Director, View Legal</p>	<p><b>Concurrent 5C</b></p> <p>Shedding the layers – Cutting complexity and our pathway to meaningful reform</p> <p>Phil Anderson, CEO, Association of Financial Advisers</p> <p>Marisa Broome, Chair, Financial Planning Association of Australia</p> <p>Simon Grant, Group Executive – Advocacy and Professional Standing, International Development and Public Affairs, Chartered Accountants Australia and New Zealand</p> <p>Vicki Stylianou, Group Executive – Advocacy &amp; Policy, Institute of Public Accountants</p> <p>John Maroney, CEO, SMSF Association</p>
	<p><b>Concurrent 6A</b></p> <p>From the trenches - TBC, TBA, TSB, DTLs ... SOS!</p> <p>Leigh Mansell, Director SMSF Technical &amp; Education Services, Heffron SMSF Solutions</p>	<p><b>Concurrent 6B</b></p> <p>Death benefits tax - Tips, traps &amp; strategies</p> <p>Julie Dolan, Partner, Head of SMSF's &amp; Estate Planning, KPMG</p>	<p><b>Concurrent 6C</b></p> <p>Dealing with the ATO - Early engagement, private ruling requests, audits, alternate dispute resolution and more</p> <p>Paul Hockridge, Principal, Hockridge Advisory Pty Ltd</p>
	<p><b>Concurrent 7A</b></p> <p>It's time to talk about SMSF digital compliance</p> <p>Shelley Banton, Head of Education, ASF Audits</p>	<p><b>Concurrent 7B</b></p> <p>Navigating state and territory land tax and duty issues</p> <p>Michael Butler, Partner, Head of Finlaysons Tax &amp; Revenue Group, Finlaysons Lawyers</p>	<p><b>Concurrent 7C</b></p> <p>The advisable Australian: Fight for the future SMSF market - The Emerging Affluent</p> <p>Andrew Braun, General Manager Marketing, Netwealth</p>

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	<p><b>Concurrent 8A</b></p> <p>Foundations of digital currencies</p> <p>Caroline Bowler,, CEO, BTC Markets</p>	<p><b>Concurrent 8B</b></p> <p>Offshore pension transfers - What's on the horizon</p> <p>Jemma Sanderson, Director, Cooper Partners Financial Services Pty Ltd</p>	<p><b>Concurrent 8C</b></p> <p>Fund establishment developments in a digitised new world - SuperStream, director IDs, electronic document execution</p> <p>Aaron Dunn,, CEO &amp; Co-founder, Smarter SMSF</p>
	<p><b>Concurrent 9A</b></p> <p>Super contributions - Evolution, developments, opportunities and risks</p> <p>David Barrett, Division Director, Macquarie Bank</p>	<p><b>Concurrent 9B</b></p> <p>Insurance policies and proceeds in an SMSF</p> <p>Peter Crump, Senior Consultant - Private Wealth, BDO</p>	<p><b>Concurrent 9C</b></p> <p>How to maximise you after tax proceeds using CGT small business concessions (and get more into your SMSF)</p> <p>David Hughes Partner, McCullough Robertson Lawyers</p>

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