



SMSF
ASSOCIATION



VIRTUAL PROGRAM

**SMSF ASSOCIATION
NATIONAL
CONFERENCE 2023**

**MELBOURNE
22-24 FEB**

LIVE STREAM & ON-DEMAND SESSIONS

Watch Live Stream sessions on the day as they are happening, all times shown are in **AEDT**. They will also be available On-Demand from **Friday 24 February 2023**.

ON-DEMAND ONLY SESSIONS

On-Demand sessions will be available for viewing from **Friday 24 February** until **Friday 31 March 2023**, for delegates registered for the virtual program.

DAY 1 PROGRAM | WEDNESDAY 22 FEBRUARY

7:00am	Exhibition Hall Open				
8:00am - 10:00am	SMSF Association Thought Leadership Breakfast presented by Class Pty Ltd How big can the SMSF sector BEE? <i>Tim Steele, Chief Executive Officer, Class Ltd</i> <i>Meg Heffron, Managing Director, Heffron Consulting Pty Ltd</i> <i>Peter Burgess, Deputy CEO / Director of Policy & Education, SMSF Association</i> <i>Dr Irene Guimatsia, Head of Research, Investment Trends</i> <i>Hazel Bateman, School of Risk & Actuarial Studies, UNSW Business School / Deputy Director, ARC Centre of Excellence in Population Ageing Research, UNSW</i>			Specialist-only session SMSFs and member capacity – How to best protect and serve your clients (and yourself) <i>Bryce Figot, Special Counsel, DBA Lawyers</i>	
10:00am - 10:30am	Morning Tea				
10:30am - 10:35am	Welcome				
10:35am - 10:55am	Chair & CEO Address <i>Scott Hay-Bartlem, Chair, SMSF Association and John Maroney, CEO, SMSF Association</i>				
10:55am - 11:50am	Plenary 1 What lies BEE-yond the horizon <i>Peter Burgess, Deputy CEO / Director of Policy & Education, SMSF Association</i>				
12:00pm - 1:00pm	LEGS & REGS Plenary Hall 2 Concurrent 1A The Deed – The Queen BEE of an SMSF <i>Clinton Jackson, Partner, Cooper Grace Ward Lawyers</i> <i>Steven Jell, Senior Associate, Cooper Grace Ward Lawyers</i>	STRATEGY Sovereign Room Concurrent 1B Keeping the colony strong – Not everyone BEE-longs in an SMSF <i>Graeme Colley, Executive Manager Technical and Private Wealth, SuperConcepts</i>	ADVICE PRACTICE & REGULATORY Eureka Room Concurrent 1C The policy buzz <i>Tracey Scotchbrook, Head of Policy & Advocacy, SMSF Association</i>		
1:00pm - 1:50pm	Lunch				
1:50pm - 2:50pm	Concurrent 2A NALI & NALE = a nasty sting <i>Daniel Butler, Director, DBA Lawyers</i>	Concurrent 2B Passing the worker BEE test <i>Craig Day, Head of Technical, Colonial First State</i>	Concurrent 2C Finfluencers and the future of advice <i>Adele Martin, Money Mentor & CFP, Founder of My Money Buddy & The Savings Squad podcast</i>	WORKSHOP Room 203 Workshop 2D Is your documentation up to it – The next frontier of SMSF disputes and audit traps <i>Scott Hay-Bartlem, Partner, Cooper Grace Ward Lawyers</i> <i>Shelley Banton, Head of Education, ASF Audits</i>	WORKSHOP Room 204 Workshop 2E Death of a member – Don't just wing it <i>Mark Ellem, Head of Education, Accurium</i> <i>Frank La Spada, Head of Technical & Training, Seamless SMSF</i>
2:50pm - 3:35pm	Afternoon Tea				
3:35pm - 4:35pm	Concurrent 3A Contributions gone wrong <i>Tim Miller, Education Manager, SuperGuardian</i>	Concurrent 3B Strategies to fund the aged care hive <i>Danni Dixon, Technical Development Manager, Aged Care Steps</i>	Concurrent 3C BEE-haviour in a world of uncertainty <i>Simon Russell, Director, Behavioural Finance Australia</i>		
4:45pm - 5:55pm	Plenary 2 Death, taxes and SMSFs – Protecting the hive when the queen dies <i>Scott Hay-Bartlem, Partner, Cooper Grace Ward</i>				
5:55pm - 7:55pm	La Trobe Financial Welcome Reception				

DAY 2 PROGRAM | THURSDAY 23 FEBRUARY

8:00am	Exhibition Hall Open				
8:50am - 9:50am	Plenary 3 Why BEE in an SMSF? Latest strategies in 2023 <i>Meg Heffron, Managing Director, Heffron Consulting Pty Ltd</i>				
9:50am - 10:05am	Special Address				
10:05am - 10:35am	Morning Tea				
10:35am - 11:35am	LEGS & REGS Plenary Hall 2 Concurrent 4A Got a BEE in your bonnet? – What's new in estate and superannuation litigation and how it effects SMSFs <i>Hayley Mitchell, Partner, Cooper Grace Ward Lawyers</i>	STRATEGY Sovereign Room Concurrent 4B Digital Assets and SMSFs – BEE alert or BEE alarmed? <i>Phil Broderick, Principal, Sladen Legal</i>	ADVICE PRACTICE & REGULATORY Eureka Room Concurrent 4C Protecting the hive – The BEEkeeper's scrum! <i>Emma Rosenzweig, Deputy Commissioner, Superannuation & Employer Obligations, Australian Taxation Office</i> <i>Leah Sciacca, Senior Executive Leader, Financial Advisers Financial Services and Wealth Group, Australian Securities and Investments Commission</i>	WORKSHOP Room 203 Workshop 4D BEE-hold all things pensions <i>Peter Crump, Senior Consultant – Private Wealth, BDO</i> <i>Shirley Schaefer, Director, BDO</i>	WORKSHOP Room 204 Workshop 4E BEE-D-BEE-Ns – Don't get stung <i>Matthew Burgess, Director, View Legal Pty Ltd</i>
11:45am - 12:45pm	Concurrent 5A Houston, we have a problem – SMSF's incapacity, and financial advisers <i>Brian Herd, Partner, HopgoodGanim Lawyers</i>	Concurrent 5B Contribution strategies – BEE innovative <i>John Perri, Head of Technical Strategy and TapIn, AMP</i>	Concurrent 5C Resistance is futile – Minimising the harm should your business suffer a cyber breach <i>Tony Vizza, Executive Director, Cybersecurity KordaMentha</i> <i>Brendan Read, Partner, Forensic, KordaMentha</i>		
12:45pm - 1:35pm	Lunch				
1:35pm - 2:35pm	Concurrent 6A Insolvency & protecting the SMSF honey pot <i>Chris Ketsakidis, Partner, Mills Oakley Lawyers</i>	Concurrent 6B Unit Trust IssueZZZ <i>Darren Wynen, Director, Insyt Pty Ltd</i>	Concurrent 6C BEE ethical <i>Christina Kalantzis, Principal - Financial Services Compliance, Alexis Compliance & Risk Solutions Pty Ltd</i>	Workshop 6D The BEEkeepers of SMSFs – The ATO & the auditor <i>Belinda Aisbett, Director, Super Sphere Pty Ltd</i> <i>Paul Delahunty, Director-Superannuation and Employer Obligations, Australian Taxation Office</i>	Workshop 6E Death of a member – Don't just wing it <i>Mark Ellem, Head of Education, Accurium</i> <i>Frank La Spada, Head of Technical & Training, Seamless SMSF</i>
2:35pm - 3:05pm	Afternoon Tea				
3:05pm - 4:05pm	Concurrent 7A LRBAs – Avoiding the sting <i>Nicholas Ali, Executive Manager, SMSF Technical Support, SuperConcepts</i>	Concurrent 7B Retirement investment strategies – A hivemind approach <i>Melanie Dunn, Principal, Accurium</i>	Concurrent 7C What's driving success in Australian advice practices today? <i>Tony Stephens, Partner, Business Health Pty Ltd</i>		
4:15pm - 4:25pm	Special Address				
4:25pm - 4:30pm	Networking Function Sponsor Address				
4:30pm - 5:25pm	Plenary 4 Looking ahead: Demographic challenges and opportunities <i>Simon Kuestenmacher, Director & Co-founder, The Demographics Group</i>				
5:30pm onwards	HALO Professional Networking Function				

DAY 3 PROGRAM | FRIDAY 24 FEBRUARY

8:00am Exhibition Hall Open

9:00am - 10:00am	LEGS & REGS Plenary Hall 2 Concurrent 8A BEE-sieged by documentation <i>Aaron Dunn, CEO & Co-founder, Smarter SMSF</i>	STRATEGY Sovereign Room Concurrent 8B Global Mo-BEE-lity of super <i>Jemma Sanderson, Director, Cooper Partners Financial Services Pty Ltd</i>	ADVICE PRACTICE & REGULATORY Eureka Room Concurrent 8C A sticky situation or as sweet as honey? – Insurance claims, trends, and challenges <i>Dr Jeffrey Scott, Head of Advice Strategy, MetLife Australia</i>	WORKSHOP Room 203 Workshop 8D BEE-hold all things pensions <i>Peter Crump, Senior Consultant – Private Wealth, BDO</i> <i>Shirley Schaefer, Director, BDO</i>
10:00am - 10:30am	Morning Tea			
10:30am - 11:30am	Concurrent 9A Litigation risk – Intent to influence <i>Peter Bobbin, Consultant Lawyer</i>	Concurrent 9B Death and taxes – BEE-yond the grave <i>Julie Steed, Senior Technical Services Manager, Insignia Financial Group</i>	Concurrent 9C Building trust with high net worth clients in volatile markets <i>Andrew Inwood, Global CEO, CoreData</i>	
11:40am - 12:35pm	Plenary 5 What happens next with improving the quality, accessibility and affordability of the provision of financial advice? <i>Michelle Levy, Partner/ QOA Reviewer, Allens / Treasury</i> <i>Sarah Abood, CEO, The Financial Planning Association of Australia</i> <i>Paul Barrett, CEO, AZ Next Generation Advisory</i> <i>John Maroney, CEO, SMSF Association</i> <i>Tahn Sharpe, Managing Editor, The Inside Network</i>			
12:35pm - 12:45pm	Closing Address			
12:50pm onwards	Charter Hall Final Day Luncheon <i>Dr Louise Mahler</i> <i>One of the top voted experts in body language and communication globally</i>			

