

SMSF Association

Application for the SMSF Specialist Scholarship Program

The SMSF Specialist Scholarship program is designed to provide individuals practicing in the SMSF and superannuation advice and/or services sector the ability to upskill through successful completion of the [SMSF Specialist Advisor™ \(SSA@\)](#) or [SMSF Specialist Auditor™ \(SSAud@\)](#) accreditation programs. Further information on the SMSF Specialist accreditation programs can be found [here](#).

Successful applicants for the scholarships will receive the following inclusions:

1. Enrolment into the SMSF Specialist Advisor™ (SSA@) or SMSF Specialist Auditor™ (SSAud@) programs
2. A pro rata membership from 1 July 2023 to 31 March 2024 (new members only)
3. Registration to the SMSF Association National Conference 2024
4. Drop-in sessions to assist you to complete the program
5. Exclusive networking opportunities at National Conference 2024

Total value up to \$4,450*.

Applications close Friday 28 April 2023. Successful applicants will be notified mid-late May 2023.

Note: This Scholarship opportunity is available to current financial members and non-members.

Eligibility Criteria:

To be eligible for consideration for the SMSF Specialist Scholarship you must meet the following eligibility criteria:

- Be an Australian citizen or permanent resident
- Be currently working with SMSFs or superannuation

Those who meet the above eligibility criteria are encouraged to apply.

Selection Criteria:

The SMSF Association is committed to providing professional opportunities for all in the sector. Special consideration for this scholarship will be given to applicants who meet one or more of the following selection criteria:

- Financial need
- Re-entering the workforce
- Aboriginal or Torres Strait Islander
- Reside in a regional or remote area
- New migrant (holding minimum permanent residence status)

Information or documentation supporting your eligibility for the selection criteria must be included with the application if you are claiming consideration under one of these areas.

To apply, please complete and return this form to memberservices@smsfassociation.com.

*Valuation includes: Pro rata membership from 1 July 2023 to 31 March 2024: \$470, Registration for selected accreditation program: \$1,980, and Registration to National Conference 2024: \$2,000.

Personal details

Full name

Company

Email

Phone

Occupation

Years worked in SMSFs or Superannuation

Are you an existing member of the SMSF Association? Yes / No

Please answer the following questions (up to 250 words per question)

If you require more space for your answers, please attach a separate document when sending through your application.

Question 1) What attracted you to the SMSF Association?

Question 2) Why are you seeking to become an SMSF Specialist?

Question 3) Provide an example of how you seek to uphold the professionalism of the SMSF sector in your current role?

Question 4) How will this scholarship assist your career?

Question 5) Why should you be considered for this scholarship?
(please reference any selection criteria that may be relevant to you here)

By submitting this form, I declare the following:

- I acknowledge that the information provided to the SMSF Association for the purpose of this application is true and correct.
- I meet the eligibility criteria for the SMSF Specialist Scholarship, and have the documentation to support any selection criteria I am claiming against.
- I hereby apply to become a member of the SMSF Association, if I am not already, and agree to disclose any further information required by the Association. I meet the [eligibility criteria](#) for Associate Membership.
- In the past 10 years, I have not been:
 - Convicted of a criminal or serious civil offence, or been subject to any disciplinary action under the Corporations Act, the Superannuation Industry (Supervision) Act 1993, Income Tax Assessment Act or Financial Services Reform Act.
 - Subject to any disciplinary action or investigations by a professional association or regulatory body, nor have I had any restrictions or disqualifications imposed on my professional status by any professional association or regulatory body.
 - Declared bankrupt in my personal capacity, or operated as an officer of a corporate entity which has been declared insolvent, either in Australia or elsewhere.

Furthermore, I declare that no other matter exists that could impact on whether I am a fit and proper person of good fame, integrity, and character. If such a matter does apply, I have fully disclosed it to the SMSF Association. I understand that the Association has sole discretion to determine whether I am fit and proper to hold membership.

- If successful with this application, I agree to abide by the Constitution, Membership Rules and Conditions, CPD Policy, Code of Professional Conduct and Disciplinary Procedures and Privacy Policy of the SMSF Association, all available at www.smsfassociation.com.
- If attained, I agree not to use the SMSF Specialist Advisor designation, or in any way hold out to be a Specialist Member, until receiving formal confirmation of my Specialist Member status from the SMSF Association

Signature

Date
