



SMSF Strategy Day – Key Strategies for Increasing Retirement Wealth

Level:	Intermediate to Advanced
Presenter:	Ashley Course
Time:	9am to 4.30pm (registration fr 8.45am)
Date:	Wednesday 23 March 2016
Venue:	Institute of Public Accountants, Level 10, 210 George Street Sydney NSW 2000
Fee from:	Member \$409.00 (incl. GST), Non-Member \$532.00 (incl. GST)
Includes:	Course notes, tuition & tea break
CPE Hours:	7.5

Topics Covered

The workshop will cover the following topics:

- SMSF legislative update including ATO pronouncements
- What services can you offer pre and post 1 July 2016
- Implications for the SMSF professional of not becoming appropriately qualified
- Today's SMSF client demands
- Strategies for increasing contributions
- Building wealth through related party entities
- Effective use of leverage in the SMSF
- Appropriate insurance within the SMSF
- Pension strategies
- Key estate planning strategies.

Introduction & Overview

It is getting closer to 1 July 2016 and the biggest shake up to the industry for many years is fast approaching. As a result, professionals servicing the industry are becoming more specialised in order to add greater value to their SMSF clients as the number of SMSFs continues to grow.

Accordingly, it has now become more important than ever to ensure professionals offer their SMSF clients more than just a compliance service. Many SMSF trustees want more value from their professional service provider and are willing to pay for this service.

This session will discuss some of the demands of today's SMSF clients and offer key strategies for increasing retirement wealth and help ensure you stay at the forefront of the SMSF industry.

Learning Objectives

Upon completion of this session attendees will have an appreciation of the need for value add services to their SMSF clients. Attendees will also demonstrate an understanding of a range of strategies to assist clients build wealth within their SMSF.

Recommended For

This session is recommended for SMSF professionals with a medium to high level understanding of legislation and regulations relating to SMSFs.

About the presenter – Ashley Course

Ashley is the Director of ARC Super which specialises in the provision of SMSF audit, technical and training services. Ashley has extensive experience designing and developing audit and quality control systems, plans and programs. For the last 9 years Ashley has trained and developed audit content for the professional accounting bodies and audit software providers. Ashley's most recent experience includes being part of the ATO Approved Auditor Committee, ASIC's SMSF Auditor Competency Exam Committee and also part of Treasury's Stronger Super working group. Ashley holds positions on various committees and working groups of the professional accounting bodies.

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IPA INSTITUTE OF PUBLIC ACCOUNTANTS
Partnership beyond numbers

Dates: Wednesday 23 March 2016

Time: 9.00am to 4.30pm (registration from 8.45am)

Venue: IPA Training Centre, Level 10, 210 George Street, Sydney NSW 2000

[Register online](#) or complete registration form and return to:

Institute of Public Accountants, Locked Bag A6090, Sydney South, NSW 1235

Ph: 02 8262 6000 Fax: 02 9251 5201 Email: nswdivn@publicaccountants.org.au

Registration Details

Title IPA Member # Postnom. Non Member

First Name Surname

Organisation

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Email Address

Dietary Requirements

Registration Confirmation - A confirmation email will be sent to you within 48 hours of the IPA receiving your registration. Please notify the IPA by phone or email if you do not receive a confirmation email within this timeframe

Payment Details

This document will be a Tax Invoice for GST purposes when you make full payment. Please keep a copy for your records.

Amount Payable	*Early Bird Rate		Regular Rate		(Registration Fee includes GST)
	IPA Member	Non Member	IPA Member	Non Member	
	\$409.00	\$532.00	\$ 499.00	\$649.00	

* Early Bird Rate applies if registration is received at least 10 days prior to the event.

Payment Method

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