

# Heffron Advanced SMSF Training

More than just an introduction to Self Managed Super Funds, this concise training session is not to be missed!

Numbers are strictly limited  
**BOOK NOW!**



In direct response to feedback from SMSF professionals, Heffron's Advanced SMSF training has been designed to meet the needs of people who require a more advanced knowledge of Self Managed Super Funds.

The training session has been specifically designed for professionals with good technical knowledge who don't need to have the basics rehashed. Our aim is for you to return to your office with a very clear idea of how to apply this knowledge and new ideas in your own practice.

This is our promise to you:

- ✓ "High-level" technical content
- ✓ Real client scenarios with unique and practical solutions
- ✓ Accurate and up-to-the minute information
- ✓ Ample session time to enable speakers to deliver comprehensive information
- ✓ Small groups to encourage discussion and debate
- ✓ Highly experienced speakers
- ✓ This is one training session you won't regret leaving the office for!

Meg and other members of the team will be available throughout the morning to talk to you in more detail about any specific issues you would like to discuss and the less formal workshop session will give you an opportunity to participate in discussions about practical SMSF issues.

Attendees will be entitled to SPAA CPD & FPA CPD points and the session will also be eligible for CPD self assessment for applicable accounting bodies / SMSF auditor requirements.

**Don't miss this innovative and thought provoking SMSF training session!**  
**See agenda overleaf or call Ben Smythe on 1300 172 247 for more information.**

#### Launceston Date & Location:

Tuesday 15 September 2009  
Launceston Club  
Tamar Road, Launceston

#### Melbourne Date & Location:

Wednesday 16 September 2009  
Morgans at 401  
401 Collins Street

#### Perth Date & Location:

Thursday 17 September 2009  
Duxton Hotel  
No 1 St. Georges Terrace

#### Cost (inc. GST):

\$330

"All sessions were excellent and all speakers were extremely knowledgeable."

"Meg is a wonderful presenter and thinks past the immediately obvious"

"Fantastic and very informative and a good mix of the technical presentation and open workshop"



## Registration & Payment Details (we will issue a tax invoice on receipt of payment)



Name: \_\_\_\_\_ Company: \_\_\_\_\_

Ph: \_\_\_\_\_ Email: \_\_\_\_\_ Address: \_\_\_\_\_

I would like to attend the following Heffron Advanced SMSF Training Session:

Launceston - Tuesday 15 September 2009  Melbourne - Wednesday 16 September 2009  Perth - Thursday 17 September 2009

My cheque is enclosed

Please debit my  Visa  Mastercard Credit Card # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Expiry Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Full Name on Card: \_\_\_\_\_ Signature: \_\_\_\_\_

Enter Amount : \$ \_\_\_\_\_ (Price includes all materials, food and drinks).

Do you have any special dietary requirements? (Please provide details)

Should you need to cancel we can refund your payment up to 14 days before the event or substitute one of your colleagues at any time.

**To secure your place, post, email (heffron@heffron.com.au) or fax back this form to us ASAP**

**Fax: 02 4930 2199 Post: Heffron, PO Box 20, North Maitland 2320**

# Heffron

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Excellence

# Training Agenda:

**8.30 - 9.00am Registration**

**9.00 - 10.30am SMSF Strategies in Practice** *Meg Heffron*

Meg will share our latest modelling and analysis of the ways in which SMSF practitioners can harness the current tax and superannuation laws to optimise a client's position. New pension strategies for clients aged 55 to 59 – how can they draw tax-free amounts irrespective of the underlying tax components of their pension balances? How can you reduce the tax payable for your top MTR clients by 30%? SMSF reserving strategies – what actually works in practice and what challenges arise? How does the halving of the concessional contributions cap affect transition to retirement strategies? How will Reportable Employer Superannuation Contributions (RESC) affect your client's ability to claim a deduction for personal contributions and what can be done about it?

**10.30 - 10.45am Morning Tea Break**

**10.45 - 12.00pm Workshop – SMSF Strategies in Practice**

In this session, we will break down several of Meg's strategies in greater detail and delve in to the key practical considerations. When would they add value for your clients? Are there any rules of thumb which help identify which clients they are suitable for? How do you actually implement the strategy in practice and what pitfalls are there that you should watch out for?

As practitioners with 100s of SMSFs under administration we understand what will and will not work from a practical point of view and this session will provide a valuable insight in to the implementation guidelines for these strategies for SMSFs.

**To secure your place, post, email ([heffron@heffron.com.au](mailto:heffron@heffron.com.au)) or fax back the form back to us ASAP.**

**For more information please call Ben Smythe on 1300 172 247**

## Your key speaker



### Meg Heffron

BEC, FIAA

Since 1991, Meg has provided superannuation consulting and actuarial services to clients ranging

in size from self managed funds to large industry funds and multi-national companies. She is one of the few actuaries in Australia who practices exclusively in the self managed fund arena. Meg is a regular speaker at professional conferences for accountants and financial planners and sits on the ATO's Superannuation National Tax & Liaison Group.

RECEIVE  
SPAA &  
FPA CPD  
POINTS

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