

Advanced SMSF Training Day 2009:

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

Numbers are strictly limited
BOOK NOW!



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

The training day 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 day you won't regret leaving the office for!

All of the speakers will be available throughout the day to talk to you in more detail about any specific issues you would like to discuss and the less formal workshop sessions will give you an opportunity to participate in discussions about practical SMSF issues.

Attendees will be entitled to SPAA CPD (17 points in 2008) & FPA CPD (7 points in 2008) and the sessions 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 day!
See agenda overleaf or call Ben Smythe on 1300 172 247 for more information.

Brisbane Date & Location:
Wednesday 2 September 2009
Sofitel Hotel
249 Turbot Street, Brisbane

Sydney Date & Location:
Wednesday 9 September 2009
L'Aqua Dockside
Darling Harbour

Hunter Valley Date & Location:
Friday 11 September 2009
Peppers Guest House*
Ekerts Road, Pokolbin
(*disc. accomm. available for the w/end)

Cost (inc. GST):
Praemium client rate - \$825

"All sessions were excellent and all speakers were extremely knowledgeable and easy to understand."

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

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 Day:

Brisbane - Wednesday 2 September 2009 Sydney - Wednesday 9 September 2009 Hunter Valley - Friday 11 September 2009

My cheque is enclosed

Please debit my Visa Mastercard Credit Card # _____ - _____ - _____ - _____

Expiry Date: ___ / ___ / ___ Full Name on Card: _____ Signature: _____

Enter Amount : \$ _____ (\$825 per person). Price includes all materials, meals 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

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Training Day 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?

12.00 - 12.45pm Legislative & Regulatory Outlook

Members of our team participate in various technical groups and industry/regulator liaison forums. Inevitably these bodies identify new issues which ultimately drive legislative change or ATO determinations. We will discuss some of the latest developments and provide some insight into the likely outcome.

12.45 - 1.45pm Lunch

1.45 – 3.00pm Workshop 1: SMSF Trustee Issues – Managing the Dynamics

Some of the most interesting questions we face in our technical work are raised by accountants and advisers with specific client problems. In this workshop, we will examine some of the key SMSF trustee challenges we see when an accountant or adviser is faced with a significant change in their client's circumstances. What options are there should your client become a non-resident, no longer be of sound mind or become incapacitated, experience a marriage or de-facto relationship breakdown or die? What needs to be done? By Whom? When? How do you manage trustee disputes? What exit strategies are there for trustees and how do you add value for your client?

3.00 - 3.15pm Afternoon Tea Break

3.15 - 4.30pm Workshop 2: Contribution caps – Real Life Trips and Traps

Contribution caps are surprisingly complex and we regularly see inadvertent breaches with dire consequences. In this workshop we will use a series of "real life" contribution cap case studies to highlight common problems and identify possible solutions to prevent excess penalties. We will examine how contributions are often overlooked and how these can affect the contribution caps and bring forward provisions, particularly in light of the latest ATO ruling defining what constitutes a "contribution".

4.30 - 5.30pm Drinks & Canapés

Your key speakers



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.

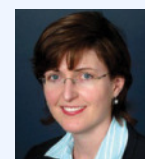


Leigh Mansell

BSc, CA, ASIA

Leigh is a chartered accountant who specialises in

superannuation. Leigh has worked in the superannuation administration and consulting industry since 1990. She has specialised in the provision of services to self managed superannuation funds since 1999 and now applies her broad range of experience within our technical support division – advising accountants, advisers and their clients on technical matters. She is regularly asked to present on current superannuation issues at professional training sessions and conferences.



Nicole Raffin

BEC, FIAA, FFin

Nicole is a qualified actuary and specialises in the area of

superannuation. Prior to joining Heffron, Nicole was an Associate Director with Macquarie Group. She worked in the Macquarie technical services team for a number of years providing detailed advice and assistance to Advisers. Most recently Nicole was instrumental in assisting the Macquarie Superannuation Wrap transition to the new Better Superannuation laws. Nicole is a key member of the technical support division providing technical support and training services for SMSF advisers.

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

For more information please call Ben Smythe on 1300 172 247

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FPA CPD
POINTS

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