

Registration Form and Tax Invoice

Upon completion of this form, including the relevant payment, this form will become a Tax Invoice. ABN 61 249 878 937

Certificate in Self Managed Superannuation

Please accept the following registration(s) at this program:

Number of people attending

Amount payable (GST-free) \$

Title Mr Mrs Ms Dr

Name

Job Title

Organisation

Postal Address

Phone

Fax

Email

Cheque (please make payable to University of Adelaide) and forward with a copy of THIS registration form to the address provided.

Debit my Bankcard Mastercard Visa

Card Number

Cardholder's Name

Expiry Date -

Signature



Peter Hogan



Peter Burgess

ICFS Teaching Staff

Teaching staff at the ICFS are committed to providing the very best quality learning experiences for students. Industry practitioners are carefully selected to teach in their areas of expertise and are leading experts in their field. Academic staff are highly qualified with vast experience in business and teaching adult learners.

Program Staff

Peter Hogan – LL.B, Dip.Financial Planning

Peter Burgess – B.Ec., MBA

Prof Ralf Zurbrugg – BSc(Econ) *LSE*, MSc PhD *Manc*,
CertDipHEd *UNSW*

Dr Syed Ali – PhD *Adelaide*, Mcom (Finance) *UNSW*, MBA
(Marketing) *Uni of Karachi*, BSc (Computer Sciences) *Uni of Karachi*

Tuition Fees for Non-Award Programs

Certificate in Self Managed Superannuation
AU\$3500 (2 courses)

How to Apply

Please complete the Registration section of this brochure and return to:

International Centre for Financial Services
The University of Adelaide, SA 5005

For further information regarding the program and applying to the University of Adelaide, please visit: www.adelaide.edu.au/icfs

Alternatively, please contact:

Assistant Director – Programs

Telephone: +61 8 8303 8398,

Facsimile: +61 8 8223 4782

Email: icfs@adelaide.edu.au

Certificate in Self Managed Superannuation

NEW RULES COVERED



INTERNATIONAL CENTRE FOR FINANCIAL SERVICES

SPAA is proud to endorse this educational opportunity for SMSF professionals offered by the University of Adelaide. This high level, quality course is playing a significant role in raising the standard of advice provided to Australians and ensuring the integrity of the SMSF Industry is maintained.

Andrea Slattery
CEO, SPAA

Courses offered face to face in most capital cities.

Life Impact The University of Adelaide

Certificate in Self Managed Superannuation

Investment in superannuation in Australia is accumulating at an astonishing rate and now totals over \$1.08 trillion. In particular the Self Managed Super Fund (SMSF) industry is rapidly increasing with over 2500 new accounts opening each month taking the total to over 410,000 SMSFs. This makes it the fastest growing sector in financial planning and wealth management.*

The SMSF industry is subject to legislative changes, compliance issues and vigorous scrutiny. Advisors in SMSFs need to increase their knowledge and skills as well as increasing the financial literacy skills of consumers.

Courses are delivered in executive style intensive mode by industry practitioners and academics.

**Current as at 29 September 2009. Statistics from APRA Quarterly Superannuation Performance Statistics report June 2009 (issued 24 September 2009).*

SMSF Professionals' Association of Australia

This course is of extremely high quality and has been designed to the required standards of the Self Managed Super Fund Professionals' Association of Australia (SPAA) National Education Register, and also independently certified.

It is one of the original accredited courses on the SPAA National Training Register.

The course presents an ideal opportunity for SPAA Specialist Advisors to complete studies at Postgraduate level as well as contributing to their professional development and satisfying a significant proportion of SPAA's CPD requirements.



Who would benefit from this program?

Anyone who wants to give comprehensive advice of the highest quality to investors in self managed superannuation funds, including Financial Planners, Fund Administrators, Auditors and Accountants.

Features

- SPAA CPD Points
- FPA CPD Points
- First University course to receive SPAA accreditation
- Lectures provided by Industry Practitioners and Academics
- Delivery is via Face to Face workshops that allow participants to interact not only with the presenter but also other participants who are generally working in the SMSF industry
- Catering included

Program Structure

The Certificate in Self Managed Superannuation consists of two compulsory courses.

Compulsory courses (6 units):

- Self Managed Super I – Establishment & Accumulation
- Self Managed Super II – Distribution & Estate Planning

Self Managed Super I – Establishment & Accumulation

Participants will analyse the benefits of SMSFs and the factors that have resulted in them being adopted by a wide range of self-employed people, employees on higher salaries with flexible remuneration arrangements and those close to retirement. The topics covered will include the formation of SMSFs, issues around trust deeds and the regulations governing them and the Superannuation Industry (Supervision) Act (SIS Act). In addition, there will be a detailed review of compliance, investment strategies, taxation at the fund level, special CGT rules, residency issues, CGT small business exemptions and instalment warrants including the new borrowing rules. The rules concerning related party asset acquisitions, sole purpose, in-house assets, non-g geared trusts, loans to members and accepting contributions will also be examined. Additionally, the participants will learn the rights and obligations of the trustees, members, auditors and other parties that are connected with the operation of the fund.

Self Managed Super II – Distribution & Estate Planning

This course consists of two sections. Three days will focus on SMSFs and examine the latest issues in estate planning, investment strategies, alternative investments, strategic opportunities and taxation. This section will also cover the pension establishment process and will examine issues such as the use of reserves in the pension environment, the segregation of pension assets for both tax and investment purposes, preservation rules, the payment of benefits to members and their dependents on death and the process to follow and specific issues to be dealt with when winding up a SMSF.

One day of the course is devoted to giving participants a general overview of the techniques used for portfolio construction and how to critically assess performance measurements.

2010 Locations & Dates

Please note you are required to attend all four dates listed per course plus the exam.

| Adelaide | |
|-----------------------|--------------------------------|
| Self Managed Super II | 26 & 27 March 7 & 8 May |
| Self Managed Super I | 23 & 24 July 27 & 28 August |

| Brisbane | |
|-----------------------|-----------------------------------|
| Self Managed Super II | 26 & 27 February 9 & 10 April |
| Self Managed Super I | 6 & 7 August 10 & 11 September |

| Melbourne | |
|-----------------------|---------------------------------|
| Self Managed Super I | 16 & 17 April 21 & 22 May |
| Self Managed Super II | 30 & 31 July 3 & 4 September |

| Perth | |
|-----------------------|--------------------------------------|
| Self Managed Super I | 12 & 13 March 23 & 24 April |
| Self Managed Super II | 17 & 18 September 22 & 23 October |

| Sydney | |
|-----------------------|-----------------------------------|
| Self Managed Super II | 19 & 20 March 30 April & 1 May |
| Self Managed Super I | 16 & 17 July 20 & 21 August |

All courses are run subject to minimum enrolment numbers being met. The International Centre for Financial Services reserves the right to cancel any course where minimum numbers are not met.