



Peter Hogan

Peter Burgess

## ICFS Teaching Staff

Teaching staff at the ICFS are committed to providing the very best quality learning experiences for students. Academic staff are highly qualified with vast experience in business and teaching adult learners. Their research activities are complemented by industry consulting assignments, which further contribute to the learning experience of students. Industry practitioners are carefully selected to teach in their areas of expertise. Most of these practitioners are leading experts in their field in which students will benefit from the opportunity to interact and network with these unique individuals.

## 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

## 2009 Tuition Fees

AU\$4356 (2 courses) or AU\$2178 per course. Financial assistance may be sought via the Australian Government FEE-HELP scheme.

More information about FEE-HELP can be found at:  
<http://www.goingtouni.gov.au/Home.htm>

## How to Apply

Download the application from <http://www.adelaide.edu.au/icfs>

For further information regarding the program and applying to the University of Adelaide please visit the website or contact:

Assistant Director – Programs

Telephone: +61 8 8303 8398 Facsimile: +61 8 8223 4782

Email: [icfs@adelaide.edu.au](mailto:icfs@adelaide.edu.au)

## Features

- SPAA CPD Points
- FPA CPD Points
- RG146 compliance in Self Managed Superannuation\*
- University qualification
- Independently accredited as the most comprehensive course in SMSFs
- First University course to receive SPAA accreditation
- Lectures provided by Industry Practitioners and Academics
- Executive Style Intensive mode of teaching
- Face to Face tuition
- Catering included

*\*In order to provide advice on Superannuation (including Self Managed Superannuation) individuals must ALSO complete an approved Tier 1 course on Superannuation.*

The University of Adelaide's Professional Certificate in Self Managed Superannuation is a very comprehensive top-level course which is strongly recommended for anyone wishing to practise in this area.

As a university award qualification it will be held in the highest regard and the course was presented by one of Australia's most knowledgeable and respected experts in this rapidly growing field of practice.

*John W. Harvey*

*FCA MComLaw, Prof Cert in Arbitration, Grad Dip App Fin & Inv, Grad Dip Fin Planning, GCMgmt, Prof Cert in SMSF*

This course was an excellent means of enhancing my knowledge in this specialist field and it is a fantastic forum to discuss strategies and technical aspects of Self Managed Superannuation and apply to real life examples amongst a group of peers.

*Brendan Daw*

*CA, Prof Cert in SMSF*

*Director – Accounting - Superguardian*

CRICOS Provider Number 00123M



# Professional 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

# Professional Certificate in Self Managed Superannuation

Investment in superannuation in Australia is accumulating at an astonishing rate and now totals over \$1.17 trillion. In particular the Self Managed Super Fund (SMSF) industry is rapidly increasing with over 2000 new accounts opening each month taking the total to over 387,000 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.

The Professional Certificate is a unique qualification that links higher education with the requirements of industry. Courses are delivered in executive style intensive mode by industry practitioners and academics. Upon completion of this program, students will be able to receive advanced standing towards the Graduate Diploma in Global Wealth Management.

*\*Current as at 29 October 2008. Statistics from APRA Quarterly Superannuation Performance Statistics report June 2008 (issued 25 September 2008).*

## 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 the first University Course accredited since SPAA has been compiling and developing its Education 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.

## Program Structure

The Professional 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, CGT small business exemptions and instalment warrants including the new borrowing rules. The rules concerning related party asset acquisitions, sole purpose, in-house assets, loans to members and accepting contributions will also be examined. Additionally, the participants will learn the rights and obligations of the trustees, members 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 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, preservation rules, the payment of benefits to members and beneficiaries and the process to follow 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.

## 2009 Locations & Dates

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

Adelaide	
Self Managed Super II	27 & 28 March
	8 & 9 May
	Exam – 5 June
Self Managed Super I	7 & 8 August
	11 & 12 September
	Exam – 30 October
Brisbane	
Self Managed Super II	13 & 14 February
	20 & 21 March
	Exam – 8 May
Self Managed Super I	14 & 15 August
	18 & 19 September
	Exam – 6 November
Melbourne	
Self Managed Super I	27 & 28 February
	1 & 2 May
	Exam – 29 May
Self Managed Super II	21 & 22 August
	25 & 26 September
	Exam – 13 November
Perth	
Self Managed Super I	3 & 4 April
	15 & 16 May
	Exam – 12 June
Self Managed Super II	28 & 29 August
	16 & 17 October
	Exam – 20 November
Sydney	
Self Managed Super II	6 & 7 February
	6 & 7 March
	Exam – 3 April
Self Managed Super I	31 July & 1 August
	4 & 5 September
	Exam – 23 October

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.