



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

2010 Tuition Fees

AU\$4500 (2 courses) or AU\$2250 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

Features

- SPAA CPD Points
- FPA CPD Points
- RG146 compliance in Self Managed Superannuation*
- University qualification
- 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

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

The Professional Certificate in Self Managed Superannuation offered by the University of Adelaide is a fantastic course for professionals seeking to provide advice in this increasingly complicated area, which is subject to continuous change. The quality of the course materials and presenter is excellent and the course structure is challenging but rewarding.

Personally I gained an incredible amount of knowledge, with resources I can refer back to. More importantly, I was able to question the presenter on a wide variety of issues relating to SMSFs and was provided with solid information that I can apply to practise.

Patrick Anwandter
BCom, PCSMS
Financial Planner and Representative
Strategy First Financial Planning Pty Ltd

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



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 \$1.08 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.

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 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.

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, 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
	Exam – 10 June
Self Managed Super I	23 & 24 July
	27 & 28 August
	Exam – 23 September
Brisbane	
Self Managed Super II	26 & 27 February
	9 & 10 April
	Exam – 13 May
Self Managed Super I	6 & 7 August
	10 & 11 September
	Exam – 7 October
Melbourne	
Self Managed Super I	16 & 17 April
	21 & 22 May
	Exam – 17 June
Self Managed Super II	30 & 31 July
	3 & 4 September
	Exam – 30 September
Perth	
Self Managed Super I	12 & 13 March
	23 & 24 April
	Exam – 27 May
Self Managed Super II	17 & 18 September
	22 & 23 October
	Exam – 18 November
Sydney	
Self Managed Super II	19 & 20 March
	30 April & 1 May
	Exam – 3 June
Self Managed Super I	16 & 17 July
	20 & 21 August
	Exam – 16 September

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.