

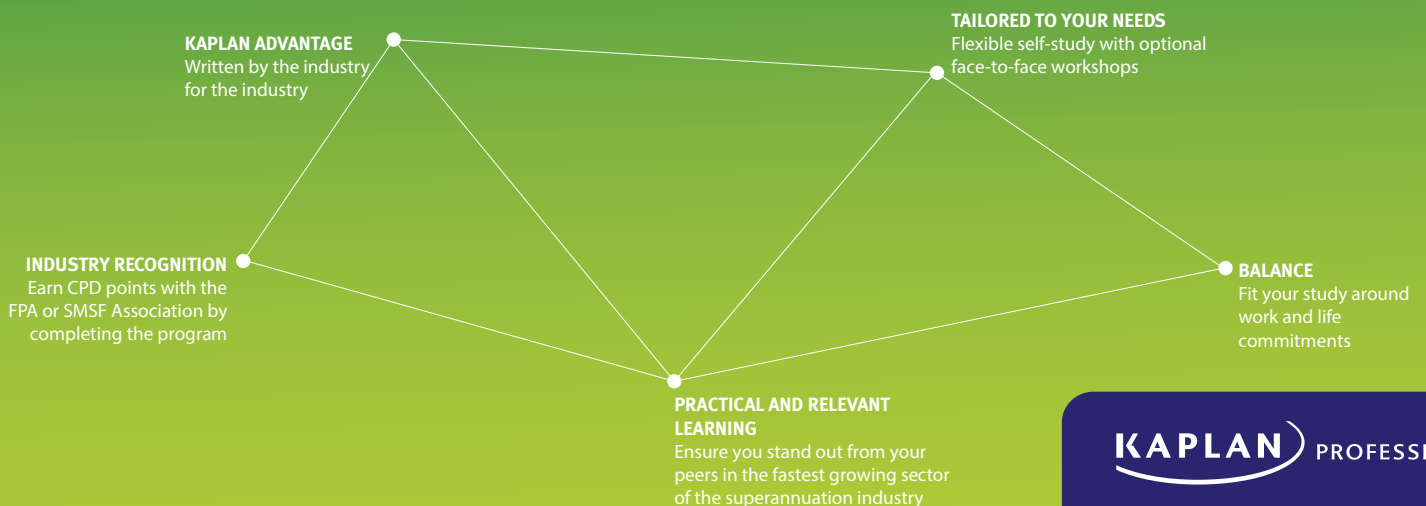


Learn, to lead.
**Self Managed
Superannuation Funds**

The Self Managed Superannuation Funds (SMSF) program is designed to provide individuals with the fundamental knowledge of the establishment, operation and management of an SMSF.

This industry-recognised program covers: trustee responsibilities, taxation, estate planning and investment restrictions, the steps involved in setting up a pension from an SMSF and strategies for different client situations.

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The Self Managed Superannuation Funds (SMSF) program meets the requirements of the accreditation pathway recommended by ASIC for those wishing to advise trustees of SMSFs.

LEARNING OUTCOMES

- › Outline the advantages and disadvantages of SMSFs
- › Describe the role of a trustee and identify who cannot be a trustee
- › Determine the most appropriate trustee structures for a fund
- › Explain the importance of a trust deed
- › Identify the trustees responsibilities
- › Explain the investment restrictions imposed on the trustees of SMSFs
- › Describe the taxation issues specific to SMSFs
- › Outline the estate planning issues and requirements of SMSFs
- › Explain the process of paying a pension from an SMSF
- › Identify various strategy and financial planning opportunities available to trustees of SMSFs

TOPICS COVERED

- Topic 1: Introduction to SMSFs
- Topic 2: Trustees roles and responsibilities
- Topic 3: Contributions, rollovers and transfers
- Topic 4: Investment restrictions
- Topic 5: Taxation issues
- Topic 6: Preservation and condition of release
- Topic 7: Benefits payment
- Topic 8: Estate planning
- Topic 9: Strategies and financial planning opportunities
- Topic 10: SMSF financial planning process

CPD

- › FPA: 22.25 CPD hours and Tax (TPB CPE) 22.25 hours
- › SMSF Association: 55 points Category 3

Enrolment Date

Start anytime.

Entry Requirements

Tier 1 RG 146 compliant to provide personal advice in superannuation.

Exemptions

Exemptions may be granted on the basis of previous study and/or experience.

Duration

12 weeks from activation date.

Delivery

Online: self-study access to a virtual classroom, or
Blended: face-to-face corporate in-house workshops with online access.

Assessment

One (1) assignment and one (1) multiple-choice exam.

Completion

A Statement of Attainment will be awarded on successful completion.

Fees

For an updated schedule of fees, please visit our website.

Correct at time of printing. Please refer to our website for more information.
kp.edu.au/smsf



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Contact us on 1300 662 203 or via email at mail@kaplan.edu.au or alternatively speak to your Business Development Manager.

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