



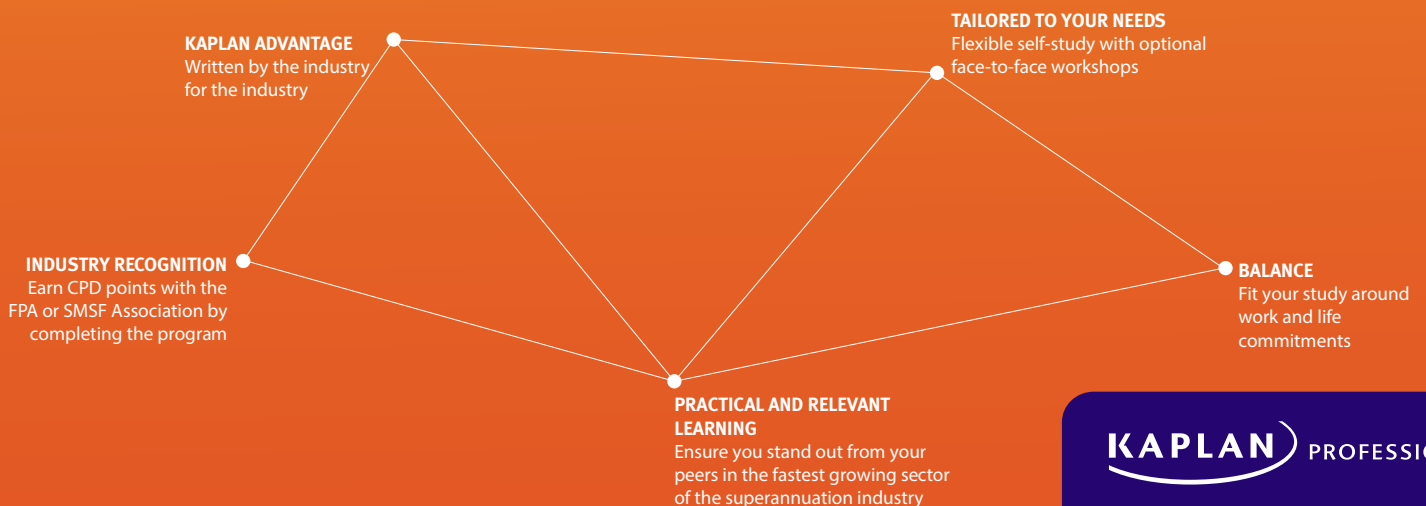
Learn, to lead.

Advanced Self Managed Superannuation Funds Workshop

The Advanced Self Managed Superannuation Funds (SMSF) program is designed to build upon fundamental knowledge of the establishment, operation and management of an SMSF.

This industry-recognised program builds on individuals' existing SMSF knowledge to safeguard clients from complex taxation and estate planning risks, and develop complex investment strategies.

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Designed by advisers, for advisers, the Advanced SMSF program is an engaging and comprehensive workshop to give you the competitive edge needed to build and maintain successful client relationships.

LEARNING OUTCOMES

- › Understand the taxation issues relevant to an SMSF
- › Learn the estate planning characteristics of an SMSF
- › Explain how death benefits will be dealt with in the event of a member's death
- › Discuss the implications of providing insurance benefits within an SMSF
- › Define strategies available to SMSF trustees
- › Determine how different investment strategies work for SMSFs
- › Describe the advantages and disadvantages of different SMSF strategies

TOPICS COVERED

Topic 1: Taxation Issues

Topic 2: Estate Planning

Topic 3: Investment Objectives and Strategies

CPD

FPA: 10.5 CPD hours and Tax (TPB CPE) 10.5 hours

SMSF Association: 11 points Category 3

*"Sean was an excellent facilitator.
The course more than met our objectives."*

Steve Ritchie

Enrolment Date

Please contact us to express interest in attending a workshop.

Entry Requirements

Tier 1 RG 146 compliant to provide personal advice in superannuation and has completed Kaplan Professional's SMSF program (or equivalent).

Exemptions

No exemptions are available for this workshop.

Duration

One (1) day face-to-face workshop 9:00 AM – 5:00 PM.

Delivery

Face-to-face interactive workshop with comprehensive study manual provided prior to workshop.

Assessment

There are no formal assessments. However, participants will be expected to engage in group discussions based on a variety of scenarios.

Completion

A Certificate of Completion will be awarded on completion.

Fees

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

"One of the best workshops I have attended."

Mike Dowling

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



CPD
Accredited



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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