



Advanced Self Managed Superannuation Funds

Subject outline

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Subject overview

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 participants' existing SMSF knowledge to safeguard clients from complex taxation and estate planning risks and develop complex investment strategies.

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

Learning outcomes

Upon successful completion of this workshop, students should be able to:

- 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
- Access strategies available to SMSF trustees
- Determine how different investment strategies work for SMSFs
- Describe the advantages and disadvantages of different SMSF strategies.

Workshop structure

- 1 – Taxation Issues
- 2 – Estate Planning
- 3 – Investment Objectives and Strategies

Units of competency

There are no units of competency in this course.

Duration and work load

The workshop is one full day (9:00am – 5:00pm).

The required pre-reading of study materials provided is estimated at approximately 40 hours.

Workshop entry requirements

To complete the Advanced SMSF program students must have completed Kaplan's SMSF program (or equivalent).

To advise on self-managed superannuation funds students must be RG146 compliant to provide personal advice in superannuation.

Delivery mode

This subject is delivered in a full day face-to-face workshop, with comprehensive study manual provided prior to the workshop.

Assessment tasks

There are no formal assessments for this workshop, however several scenarios will be discussed as a group in the workshop.

CPD points

Financial Planning Association (FPA)

- Accreditation for up to 10.5 hours credit of continuing professional development for students who successfully complete this program from 17 July 2015.
- Professional Dimensions: Capability (5.25 hours) and Critical Thinking (5.25 hours). Tax (TPB CPE) 10.5 hours.

SMSF Association

- Awarded against the 'Taxation and estate planning' SMSF Association knowledge area: 12 points

Fees

An updated schedule of fees is available at the Kaplan Professional website:
<www.kaplanprofessional.edu.au>.

Recognition of prior learning and/or workplace competence

No exemptions are available for this workshop.

Education policies

Students who enrol in a Kaplan course are bound by our published Educational Policies, including the policy that sets out our rules for assessment. You can review these policies before you enrol by going to the Kaplan website: <http://www.kaplanprofessional.edu.au/Study_Information/Policies>.

The policies also assist you when your study program does not go as planned and you need extra support.