



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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KAPLAN PROFESSIONAL ADVANTAGE
Written by the industry for the industry

TAILORED TO YOUR NEEDS
Flexible self-study with optional face-to-face workshops

INDUSTRY RECOGNITION
Earn CPD points with the FPA or Self Managed Super Fund Association by completing the program

BALANCE
Fit your study around work and life commitments

PRACTICAL AND RELEVANT LEARNING
Ensure you stand out from your peers in the fastest growing sector of the superannuation industry

KAPLAN PROFESSIONAL

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: 12 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).

Recognition of Prior Learning (RPL)

There is no RPL available for this course as there are no units of competency awarded.

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.

Correct at time of printing. For more information about this course, please refer to our website.

kp.edu.au/asmsf

"One of the best workshops I have attended."

Mike Dowling



CPD
Accredited