



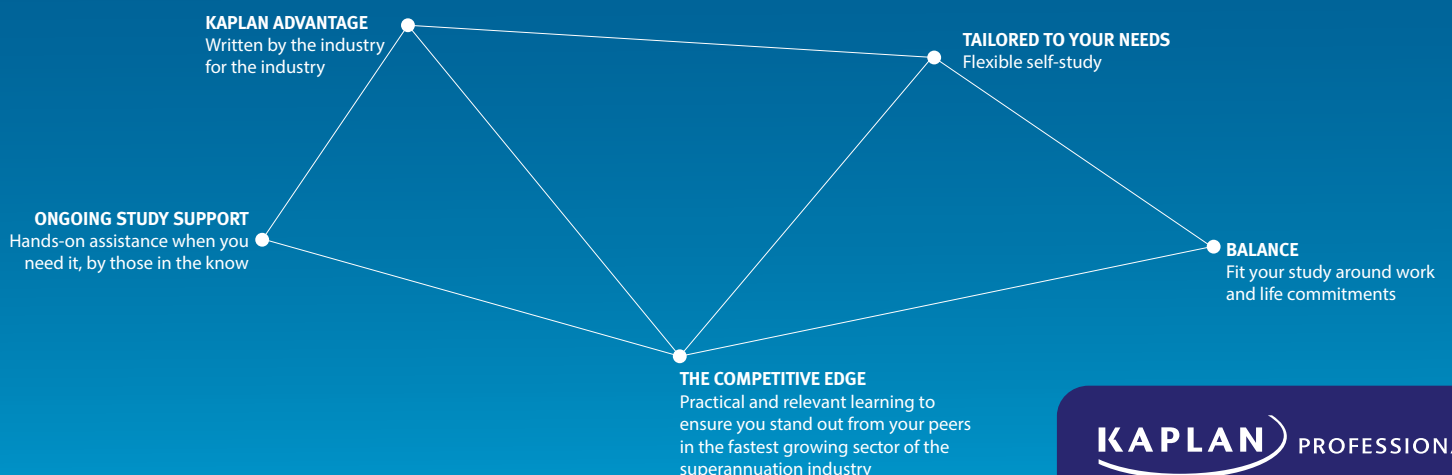
*Learn, to lead.*

## **Introduction to Self Managed Superannuation Funds**

Self Managed Superannuation Funds (SMSF) is the fastest growing segment of the superannuation industry. The Introduction to SMSF program will provide individuals with an overview of the superannuation industry and self managed superannuation funds.

Students will gain an understanding of the contribution rules and conditions along with the investment restrictions that apply to self managed superannuation funds.

[kaplanprofessional.edu.au](http://kaplanprofessional.edu.au)



Designed for those wanting to specialise in SMSFs, the Introduction to SMSF program provides individuals with an understanding of the contribution rules and the conditions involved.

## LEARNING OUTCOMES

- › Demonstrate an understanding of the Australian superannuation and retirement system
- › Explain the main types of contribution, preservation, and conditions of release
- › Demonstrate an understanding of an SMSF, the regulation of superannuation funds, and what a complying superannuation fund is
- › Outline the advantages and disadvantages of an SMSF
- › Describe the role of a trustee and their responsibilities, including legal obligations, common law duties and reporting requirements
- › Determine the most appropriate trustee structures for a fund
- › Explain the importance of a trust deed and the deemed covenants
- › Identify the importance of a superannuation fund's investment strategy
- › Explain the investment rules and restrictions that apply to SMSFs, including, non-arm's length investments, acquisitions from related parties, in-house assets, financial assistance to members, borrowing restrictions and limited-recourse borrowing arrangements

## TOPICS COVERED

Topic 1: Superannuation Overview

Topic 2: SMSF Overview

Topic 3: Trustees and Trust Deeds

Topic 4: Investment Restrictions

*"The online experience was great. It was well supported by the Kaplan student services team."*

Iain Robyn

### Enrolment Date

Start anytime.

### Entry Requirements

There are no entry requirements for this course.

### Recognition of Prior Learning (RPL)

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

### Duration

12 weeks from activation date.

### Delivery

Online: self-study access to a virtual classroom.

### Assessment

One (1) open-book online exam.

### Completion

A Certificate of Completion will be awarded on successful completion. There are no units of competency in this course.

### 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/ismsf](http://kp.edu.au/ismsf)

