8.00 – 8.50AM REGISTRATION

8.50 – 8.55AM OFFICIAL WELCOME
KATARINA TAURIAN, MANAGING EDITOR SMSFAVISER

8.55 – 9.00AM A WORD FROM OUR EVENT PARTNER
SUPERCONCEPTS

9.00 – 10.00AM A COMPREHENSIVE TECHNICAL AND LEGISLATIVE UPDATE
• An examination of recent ATO rulings, interpretative decisions and other announcement from the regulators impacting on the SMSF sector
• Tips, traps and take-aways from the latest round of super reform and a look at what else is on the reform agenda
• Exploration of new and topical SMSF strategies, including contribution strategies
PETER BURGESS, GENERAL MANAGER, TECHNICAL SERVICES AND EDUCATION, SUPER CONCEPTS

10.00 – 11.00AM UNDERSTANDING AND NAVIGATING THE NEW CGT RULES
• What has changed and which of my clients will be affected?
• Tips and potholes that have surfaced post-reform
• Insight from the ATO as to where professionals and SMSF trustees are going wrong
• Understanding contributions under the new CGT rules
COLIN LEWIS, HEAD OF STRATEGIC ADVICE, PERPETUAL

11.00 – 11.45AM MORNING TEA

11.45 – 12.45PM PROPERTY AND SMSFS: TIPS AND TRAPS IN THE NEW WORLD
• Technical examination of new and existing loans guidance
• Contributions and property under the new superannuation rules
• Case study: Property development in super funds – what you need to know to keep your clients compliant
CLINTON JACKSON & SCOTT HAY BARTLEM, PARTNERS, COOPER GRACE WARD

12.45 – 1.30PM LUNCH

1.30 – 2.30PM CLARIFYING CONFUSION AND EXPLORING NEW STRATEGIES WITH THE $1.6M TRANSFER BALANCE CAP
• A thorough explanation of cap valuation principles
• How to manage transfer balance accounts and the new event reporting obligations
• Proportional indexation and strategies to consider when commencing a second pension
• Paying reversionary pensions post - reform
BRYAN ASHENDEHN, HEAD OF FINANCIAL LITERACY & ADVOCACY, BT ADVICE SERVICE, BT FINANCIAL GROUP

2.30 – 3.30PM ESTATE PLANNING: WHAT NEEDS UPDATING NOW?
• What should your clients be updating in light of this year’s super reform?
• Myth busting: documents that aren’t always watertight
• Avoiding litigation: Where to draw the line in your involvement with online documentation
PETER BOBBIN, MANAGING PRINCIPAL, ARGYLE LAWYERS

3.30 – 4.00PM AFTERNOON TEA

4.00 – 5.00PM FROM THE REGULATOR: A WORD FROM THE ATO
• An insight to guidance and regulations in the pipeline for the SMSF sector
• New and emerging compliance targets
• Live Q&A: The ATO answers audience and speaker questions.
KASEY MACFARLANE, ASSISTANT COMMISSIONER, AUSTRALIAN TAXATION OFFICE (QLD/NSW/VIC)
HOWARD DICKINSON, DIRECTOR SUPERANNUATION, AUSTRALIAN TAXATION OFFICE (SA/WA)

5.00 – 5.05PM CONFERENCE CLOSE
KATARINA TAURIAN, MANAGING EDITOR SMSFAVISER

5.05 – 6.00PM NETWORKING DRINKS