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SMSF Seminar

Presenter: Monica Rule
Date: Thursday 3 July 2014
Time: 9.00am to 4.15pm
Venue: Perth Convention and Exhibition Centre
21 Mounts Bay Road, Perth
Fee: \$440.00 (inc GST)
A full-fee paying attendee can bring a partner, friend or business associate for \$220.00 (inc GST)
Includes: SMSF Handbook, session notes, morning tea, lunch & afternoon tea

SPAA CPD points: 6

Introduction

This seminar is designed for people interested in the set up and maintenance of Self Managed Superannuation Funds (SMSFs). Topics will cover the main areas of the Superannuation law that you need to know in order to gain a good understanding of how the law applies to SMSFs.

Learning Objectives

On completion of this seminar attendees will understand various provisions in the Superannuation law in relation to establishing, maintaining and winding up a complying self managed superannuation fund.

Recommended For

Trustees, accountants and financial planners who have entered the self managed super fund market.

Topics

- Australian retirement income policy
- Self managed superannuation fund structures
- Who can be a trustee of an SMSF?
- Australian Superannuation Fund
- Non-complying SMSF
- Sole purpose test
- Trustee covenants
- Arm's length transactions
- Lending and providing financial assistance to members/relatives
- Acquiring assets from a related party
- In-house assets rules
- Borrowings
- Administrative obligations
- Contribution standards
- Payment standards
- Illegal early access.

About the presenter

MONICA RULE

Monica Rule worked for the Australian Taxation Office for 28 years and spent 17 years in the Superannuation Business Line as a technical advisor, trainer, and compliance officer who audited SMSFs and assisted SMSF trustees, accountants, auditors and lawyers with complex superannuation queries. Monica Rule holds a Diploma of Superannuation Management and is a SPAA accredited SMSF Specialist Advisor. Monica is a regular columnist for the *West Australian* and *Australian* newspapers and is the author of *The Self Managed Super Handbook*.

Monica Rule – Your Self Managed Super Expert

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REGISTRATION FORM AND TAX INVOICE

ABN 91 312 148 583

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Complete registration form and return to:

Monica Rule – Your Self Managed Super Expert, PO Box 105, Hillarys, WA 6923 or scan the completed form and send to: enquiries@monicarule.com.au

Registration Details

Title First Name Surname

Second Attendee

Organisation (if any)

Postal Address Work Home

Suburb State Postcode

Phone # Fax #

Email Address

Dietary Requirements

Please indicate how you wish to receive confirmation Email Post

Payment Details

This document will be a Tax Invoice for GST purposes when you make full payment. Please keep a copy for your records.

Amount Payable

Single Attendee \$440.00 (Registration Fee includes GST)

Second Attendee (in addition to full-fee payer) \$220.00 (Registration Fee includes GST)

Payment Method

Cheque Please find enclosed my cheque for: \$

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(Pay via PayPal at www.monicarule.com.au)

Direct Debit Amount paid: \$ Transaction Reference:

Direct debits can be made to: 'Sunshine Press', BSB Number: **306-073** (Bank West) Account Number: **0896230**

Please use your name as a reference when transferring funds.

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