

The Presenters



Manoj Abichandani

SSA, SSAud, CTA, FIPA

Superannuation Technical Director
www.trustdeed.com.au

Creator of Australia's first Cloud based
SMSF audit software
www.onlinesmsfaudit.com.au



Mark Wilkinson

CA, SSA

Director
Wilkinson Superannuation



Peter Bobbin

Practice Areas: Taxation
Trusts
Superannuation

Principal at
Argyle-Legal



Deanne Firth

FCA

Director
Tactical Super



Nathan Papson

LLM SSA CTA

 **Online SMSF Audit**
www.onlinesmsfaudit.com.au

SMSF School Autumn 2015

The concept and content of the SMSF School 2015 Seminar series has been developed by experienced SMSF professionals who have special expertise in the accounting and audit profession. The seminars provides a platform where you can learn from experts and incorporate the knowledge directly into your business.

Seminar Locations and Dates



Parramatta

24th February 2015

Novotel

Parramatta 350 Church
Street Parramatta NSW
2150



Melbourne

26th February 2015

Stamford Plaza

111 Little Collins Street
Melbourne VIC 3000



Brisbane

3rd March 2015

Hilton Brisbane

190 Elizabeth St. Brisbane
QLD 4000



Sydney

5th March 2015

Parkroyal Darling

Harbour 150 Day Street
Sydney NSW 2000

Delegates will also receive credit to audit 10
SMSF on cloud worth \$165

PLUS

One pension document from
www.trustdeed.com.au worth \$165

OR

One Actuarial Certificate from
www.trustdeed.com.au worth \$97.50

**These documents must be ordered within
30 days from the date of the seminar.**

**You can get back a value of \$330 or
\$262.50 depending on your choice
PLUS 7.5 CPD hours**

2 hour workshop - Cloud Disruption in SMSF Audit

Automation in SMSF audit brings reliability, consistency, speed and quantity without sacrificing quality. By using a smart interactive interface, SMSF auditor gets peace of mind and assurance that nothing is left out in the audit process.

Like modern administration softwares, you will learn how SMSF cloud auditing is helping auditors complete a SMSF audit in half the time.

The Workshop Facilitator: Manoj Abichandani

Manoj is a seasoned speaker at various professional discussion groups. He has worked in the SMSF industry for the past 26 years in various capacities including as a tax agent, accountant and SMSF Auditor. He is probably one of the most experienced advisers in this field.

He has created an online SMSF audit tool which can be used by all SMSF auditors to improve quality and speed of audit. He currently works as an SMSF Technical Director at www.trustdeed.com.au where he develops new SMSF strategies and answers advisers & practising accountants' queries on complex SMSF matters.

Proposed Agenda

Sydney/Parramatta Seminars

6.30 am to 7.00 am:

Welcome Tea & Coffee and Networking

7.00 am to 9.00 am:

Workshop Cloud disruption in SMSF Audit – **Manoj Abichandani**

9.00 am to 9.30 am:

Registration Morning Tea & Coffee and Networking

9.30 am to 11.00 am:

Errors to Avoid in Setting up an SMSF - **Mark Wilkinson**

11.00 am to 11.30 am:

Tea & Coffee and Networking

11.30 am to 1.00 pm:

Structuring Pensions in an SMSF – **Manoj Abichandani**

1.00 pm to 2.00 pm:

Lunch Break

2.00 pm to 3.30 pm:

Dangers of Investing in Personal Use and Misc. Assets – **Deanne Firth**

3.30 pm to 4.00 pm:

Afternoon Tea & Coffee and Networking

4.00 pm to 5.30 pm:

Professional Advisers' Duties, Obligations & Risks in advising SMSFs – **Peter Bobbin**

Melbourne Seminar

6.30 am to 7.00 am:

Welcome Tea & Coffee and Networking

7.00 am to 9.00 am:

Workshop Cloud disruption in SMSF Audit – **Manoj Abichandani**

9.00 am to 9.30 am:

Registration Morning Tea & Coffee and Networking

9.30 am to 11.00 am:

Dangers of Investing in Personal Use and Misc. Assets – **Deanne Firth**

11.00 am to 11.30 am:

Tea & Coffee and Networking

11.30 am to 1.00 pm:

Structuring Pensions in an SMSF – **Manoj Abichandani**

1.00 pm to 2.00 pm:

Lunch Break

2.00 pm to 3.30 pm:

Technical Update – **Nathan Papson**

3.30 pm to 4.00 pm:

Afternoon Tea & Coffee and Networking

4.00 pm to 5.30 pm:

Errors to avoid in setting up an SMSF – **Mark Wilkinson**

Brisbane Seminar

6.30 am to 7.00 am:

Welcome Tea & Coffee and Networking

7.00 am to 9.00 am:

Workshop Cloud disruption in SMSF Audit – **Manoj Abichandani**

9.00 am to 9.30 am:

Registration Morning Tea & Coffee and Networking

9.30 am to 11.00 am:

Structuring Pensions in an SMSF – **Manoj Abichandani**

11.00 am to 11.30 am:

Tea & Coffee and Networking

11.30 am to 1.00 pm:

Errors to Avoid in Setting up an SMSF – **Mark Wilkinson**

1.00 pm to 2.00 pm:

Lunch Break

2.00 pm to 3.30 pm:

Dangers of Investing in Personal Use and Misc. Assets – **Deanne Firth**

3.30 pm to 4.00 pm:

Afternoon Tea & Coffee and Networking

4.00 pm to 5.30 pm:

Technical Update – **Mark Wilkinson**

- The fee for the seminar is \$495 Incl GST
- Please visit <https://www.onlinesmsfaudit.com.au/SeminarBooking.aspx> for detailed description about each session and topic.

Session Information

Structuring Pensions in an SMSF

Issues to consider before commencing a pension in a self-managed super fund. Pension conditions for account based pensions as per SIS Regulation. How by implementing some complex pension strategies, Trustees can change the final income tax outcome for funds. Some estate planning issues which must be considered by advisors, when commencing a pension in a SMSF.

Speaker: Manoj Abichandani

Superannuation Technical Director www.trustdeed.com.au,
Creator of Australia's first Cloud based SMSF audit software
www.onlinesmsfaudit.com.au

Errors to Avoid in Setting up an SMSF

Your super could be your biggest asset and it is paramount that you secure your asset from liquidators. In this session we will discuss errors to avoid in setting up an SMSF.

Speaker: Mark Wilkinson

Director, Wilkinson
Superannuation

Professional Advisers' Duties, Obligations & Risks in advising SMSFs

In this presentation we will discuss the many Risks and Obligations for an accountant or professional adviser when advising clients about SMSFs. Advisers need to be aware of their legal, insurance, dealer group requirements and professional body obligations, besides other risks, such as, regulation 7.1.29A of the Corporations Regulations which permits accountants to provide limited advice regarding the establishment, operation or valuation of an SMSF without the need to be licensed adviser.

Speaker: Peter Bobbin

Principal at Argyle-Legal

Technical Update

This session will focus on the major opportunities that arise from announcements, new legislations, tax rulings and regulatory guidance released in the last 12 months.

**Speaker: Mark Wilkinson /
Nathan Papson**

Dangers of Investing in Personal Use and Misc. Assets

In this session we will discuss what personal use assets are and mistakes can be made by trustees in investing in personal use assets. What are the various insurance rules and what are the issues which are checked by auditors and ultimately reported to ATO in a contravention report.

Speaker: Deanne Firth

Director, Tactical Super

Registration Form

1. Choose a session

- ☐ Sydney at Novotel Parramatta - 24th February 2015
- ☐ Melbourne at Stamford Plaza - 26th February 2015
- ☐ Brisbane at Hilton Brisbane - 3rd March 2015
- ☐ Sydney at Parkroyal Darling Harbour - 5th March 2015

2. Your details

Firm _____

Address _____

Pcode _____ Telephone _____ Fax _____

Email _____

3. Attendees

No. of attendees: _____

Name: Mr/Mrs/Miss/Dr _____

Email: _____

Name: Mr/Mrs/Miss/Dr _____

Email: _____

Name: Mr/Mrs/Miss/Dr _____

Email: _____

4. Fee for seminar is \$495 Incl. GST ☐

a) Cheque, made payable to **DEED DOT COM DOT AU PTY LTD**
Mailing Address - PO Box 1010 Dundas NSW 2117

b) Paying by Credit Card at <https://www.onlinesmsfaudit.com.au/SeminarBooking.aspx>
or provide the credit card details through email to agni@trustdeed.com.au
or fax to (02) 9638 3060 after signature

Visa Card / Mastercard / American Express (circle one)

Name on Credit Card _____

Credit Card Number

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Expiry Date

Day	Month	Year	CVV Number

Signature of Card Holder _____

c) Paying by Direct Bank deposit (Electronic Funds Transfer - EFT)

Please deposit the funds directly into following bank account:

Account Name: **DEED DOT COM DOT AU PTY LTD.**

Bank: **NAB** BSB: **082-167** Account No.: **138366304**

After Payment: Email Electronic Bank Receipt to agni@trustdeed.com.au

For any further enquiry – Contact Agni at 02 96844199

Confirmation of Booking

Bookings will be confirmed and a tax invoice will be provided. If you have not received confirmation within 5 business days of sending your registration -please contact Agni immediately on 02 96844199.

Privacy Statement

Onlinesmsfaudit.com.au (DEED DOT COM DOT AU PTY LTD) protects the privacy and security of information provided by you.

Cancellations or Transfers

If you need to cancel a seminar booking, you must inform us. However a substitute participant will be accepted anytime.

Cancellations

More than 7 full business days before the seminar:

- 100% Refund

Within 7 business days of the seminar:

- No refunds will be available for cancellation, although credit to audit 10 SMSF on cloud worth \$165 and One free Actuarial Cert or Pension document from www.trustdeed.com.au will be provided.

We reserve the right to cancel seminars if the minimum numbers of participants are not registered. If the seminar is cancelled, a full refund will be issued. The registrant will be contacted by email no later than 1 week upon seminar cancellation.