

## Strategic practical training for financial planners

# Self-managed super funds

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DBA Lawyers and *Professional Planner* present half-day self-managed super fund (SMSF) seminars. Each seminar contains two discrete SMSF topics and a general update. Topics are chosen carefully each quarter, based on current issues, and delve into the rules that advisers will typically need to master. Learning is supplemented by practical case studies and examples. Each quarter's seminar covers completely new material.

The upcoming topics for May/June 2011 are:

### Topic 1 - latest strategies for structuring investments

There have been immense changes recently: new borrowing laws, many SMSFs looking to invest overseas, proposed changes for personal use assets and collectable. We consider the latest strategies for 2011, including:

- Latest strategies for borrowing (including related party loans)
- Latest on property developments in SMSFs
- Techniques for structuring with unit trusts (both related and unrelated)
- SMSFs investing overseas - the most mistakes and how to ensure your client comply

### Topic 2 - pension strategies

This session closely examines some interesting pension strategies using realistic case studies, including:

- Segregated versus unsegregated pensions and strategic opportunities to maximise carried forward capital losses
- Over- and under-paying pensions - how it effects the pension exemption and whether an ACR is needed
- Do "auto-reversionary" take priority over BDBNs?
- Transition to retirement - tips and common traps

### General update

A practical guide to the most recent changes and topical issues impacting SMSFs, including latest cases, legislation, regulatory developments and other tips and traps.

### Open forum

We will open the floor to any questions on any topic. This session often provides invaluable guidance and insights into the latest in real life practitioner problems and solutions.

### Cost:

May/June seminar: \$230 (incl GST).

A discounted registration fee of \$800 is available for registrations for the next four quarterly seminars.

Ask about discounts for four attendees or more

**CPD Points:** 5 (SPAA); 3 (other bodies, including FPA)

Designed for: Advisers seeking to master SMSF strategies and who wish to stay abreast of all relevant SMSF news.

**Please see next page for registration form and details of times and venues for May/June seminars**

## UPCOMING SEMINARS

2011/2012 seminar series

	<b>ACT</b>	<b>NSW</b>	<b>QLD</b>	<b>SA</b>	<b>TAS</b>	<b>VIC</b>	<b>WA</b>
<b>AUGUST</b>	23rd	24th	25th	18th	24th	26th	19th
<b>NOVEMBER</b>	15th	16th	17th	10th	9th	18th	11th
<b>MARCH (2012)</b>	13th	14th	15th	8th	7th	23rd	9th

# MAY/JUNE 2011 SELF-MANAGED SUPER FUND SEMINARS

Registration: 8:15am - 8:30; Seminar: 8:30am - 12 noon

Please register using the form below

**MAY/JUNE**      **ACT**      **NSW**      **QLD**      **SA**      **TAS**      **VIC**      **WA**  
May 24      May 25      May 26      May 19      May 18      June 3      May 20

## SEMINARS WILL BE HELD AT:

State	Venue	Address
ACT	Canberra Rex Hotel	150 Northbourne Ave, Braddon
NSW	The Menzies Sydney Hotel	14 Carrington St, Sydney
QLD	Christie Corporate Conference Centre	320 Adelaide St, Brisbane
SA	Chifley on South Terrace	226 South Terrace, Adelaide
TAS	Hotel Grand Chancellor	29 Cameron Street, Launceston
VIC	The Arts Centre Building	100 St Kilda Road
WA	Citigate Perth	707 Wellington Street, Perth

## Presenters:



**Dan Butler**  
Director, DBA Lawyers



**Bryce Figot**  
Senior Associate, DBA Lawyers

## REGISTRATION FORM & TAX INVOICE

**SELECT VENUE:**     ACT     NSW     QLD     SA     TAS     VIC     WA

**SELECT PRICE:**     May/June seminar only (\$230)     Next four quarterly seminars (\$800)

*Ask about discounts for three attendees or more*

Attendee's name: \_\_\_\_\_ Firm: \_\_\_\_\_

Postal address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Attendee's email: \_\_\_\_\_

Pay by cheque payable to **DBA Network Pty Ltd ABN 99 103 551 819** or credit card for \$:

Card number: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Card holder's name: \_\_\_\_\_

Expiry date (month/year): \_\_\_\_ / \_\_\_\_

Signature: \_\_\_\_\_

Card Type:     Visa     MasterCard

Please send to DBA Network Pty Ltd, PO Box 2085, South Melbourne VIC 3205 or fax to (03) 9092 9440. Enquiries: Marie Zarifis on (03) 9092 9400 or dbanetwork@dbalawyers.com.au

NOTES: Tax Invoice: This document will be a Tax Invoice for GST when fully completed and you make a payment. Please retain original copy for your records. CPD: Seminars are approved for CPD purposes by SPAA. You may also qualify for CPD points under the self-assessment guidelines of your professional body or dealer group. DBA Lawyers Pty Ltd, Lawyers (ABN 74 120 513 037) obtains a presenter's fee. Conexus Financial Pty Ltd ACN 120 292 257 obtains a fee from DBA Network Pty Ltd ABN 99 103 551 819 for promotional services.