



THE TAX INSTITUTE



Superannuation Intensive

30–31 March 2022 | Online

8 CPD hours



Welcome

On behalf of The Tax Institute and the Organising Committee, I am delighted to invite you to attend the Superannuation Intensive.

Running online over two days from 30–31 March 2022, the Superannuation Intensive features sessions specifically targeting the key issues for advisers and practitioners in the superannuation industry with a particular focus on self-managed superannuation funds (SMSFs).

Bringing together expert speakers from across the country, delegates can expect to walk away with an up-to-date and enhanced understanding of a range of topical subject areas including pensions, contributions, SMSF audit and tax as well as SMSF residency and foreign transfers. Delegates will be given a status update of relevant legislation over the past 12 months and hear from the regulator on their key areas of focus. As an added bonus, the final session brings together a panel of our speakers to discuss the practical issues during the lifecycle of an SMSF and answer questions from delegates.

In the ever-changing landscape of superannuation, our role as advisers to our clients necessitates staying abreast of the latest developments in our industry. The Superannuation Intensive promises to deliver in this endeavour.

I look forward to seeing you at what I believe will be an engaging, valuable and content-rich event.



A handwritten signature in black ink that reads "Liz Westover".

Liz Westover, FTI
Chair – Superannuation Intensive Organising Committee

Thank you

A special thank you to the organising committee and our speakers for the time, energy and support they have contributed to ensuring that the Superannuation Intensive maintains the high standards we have come to see from this event.

The Tax Institute gratefully acknowledges the generous assistance of members of the Superannuation Intensive Organising Committee:

Liz Westover, FTI, Deloitte Private
(Chair, Intensive Organising Committee)

Julie Dolan, KPMG

Nick Panos, CTA, N.Panos & Associates

Jemma Sanderson, CTA,
Cooper Partners Financial Services

Shirley Schaefer, BDO

Early bird offer

Register on or before Friday, 4 March 2022 to save!

Technical program

Day 1 – Wednesday, 30 March 2022

Time	Session	Presenter
10:30–11:30am	Session 1: Keeping up with the ever-evolving SMSF industry It seems that change is the only constant and this update session will provide a rundown on all the legislative and regulatory changes impacting the SMSF sector over the last 12 months as well as recent ATO updates and guidance. Highlighting the important changes and what they might mean for your clients, the session will also discuss other industry developments and expectations that will have an impact on trustees and their advisers in a Federal Election year.	Tim Miller SuperGuardian
11:30am–12:30pm	Session 2: Superannuation contributions – latest strategies and tips This session will explore in detail and via practical application the latest contribution rules and strategies. There have been and will be a number of further developments from 1 July 2022. These developments are not without its complexities, so getting on top of these contributions changes will be crucial for timely application to your client's needs.	Julie Dolan KPMG
12:30–1:00pm	Delegate lunch break	
1:00–2:00pm	Session 3: The most taxing issues in Super This session will discuss the top tax issues in superannuation. From exempt current pension income and deductions to capital gains, Liz will provide a practical session to assist you in delivering the right tax outcomes for your SMSF clients. She will cover key tax matters with a strong focus on those in the ATO spotlight as well as providing plenty of hints and tips along the way.	Liz Westover, FTI Deloitte Private
2:00–3:00pm	Session 4: SMSF regulator update – what you need to know for 2022 The session will cover an overview of the ATO key risk focus areas affecting SMSFs and findings from the independent SMSF research.	Justin Micale Australian Taxation Office Facilitator: Liz Westover, FTI Deloitte Private



Technical program continued

Day 2 – Thursday, 31 March 2022

Time	Session	Presenter
10:30–11:30am	Session 5: SMSFs and pensions This session will review current issues and strategies in managing pensions in SMSFs by taking a deep dive into complying pensions and the Government's proposed amnesty. Through a series of case studies, the session will cover: <ul style="list-style-type: none">– Transition to retirement pensions– Indexation of the transfer balance cap– Death benefit pensions– Defined benefit pensions	Julie Steed Australian Executor Trustees
11:30am–12:30pm	Session 6: SMSF audit – what to expect The SMSF audit can be a tedious process, so what can you do to make it an easier process. This session will look at the key 2021 audit issues and what can be done in advance to reduce auditor queries. The session will cover: <ul style="list-style-type: none">– Top SMSF audit issues for 2021– Practical tips and case studies to 'deal' with the auditor– Key audit risks in a SMSF audit	Shirley Schaefer BDO
12:30–1:00pm	Delegate lunch break	
1:00–2:00pm	Session 7: Global mobility and superannuation With our global workforce, and particularly many people being trapped in Australia or overseas due to COVID, their superannuation position across multiple jurisdictions has become an increased area of practice. Where international pension / superannuation systems are not all created equal, and having different taxation considerations, in this session Jemma will provide some insight and guidance regarding: <ul style="list-style-type: none">– Transferring money from foreign super onshore– Transferring money from Australian super offshore– Foreign superannuation fund considerations– Foreign trust considerations– Residency of SMSFs post 2021/2022 Budget announcements– SMSF and the IRS – what do you need to know?– SMSF with ROPS status – what are the reporting obligations?– Applicable Fund Earning calculations and considerations– How divorce might impact overseas pension schemes.	Jemma Sanderson, CTA Cooper Partners Financial Services
2:00–3:00pm	Session 8: Panel discussion – The lifecycle of a SMSF – practical issues With the aid of a facilitator, this panel of leading experts will discuss some of the most important, complex and relevant practical issues that practitioners encounter during the lifecycle of a SMSF. The discussion will follow each stage of the lifecycle, from the creation of the SMSF, contributions to the SMSF, investments by the SMSF, the payout of benefits to the winding-up of the SMSF. Participants will also have the opportunity to put questions to the panel.	Julie Dolan KPMG Jemma Sanderson, CTA Cooper Partners Financial Services Shirley Schaefer BDO Facilitator: Nick Panos, CTA N.Panos & Associates

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Presenter profiles

Julie Dolan is the National Head of Superannuation and Estate Planning as well as the Sector Lead 'Asset & Wealth Management – Financial Services' for KPMG Enterprise. She is well recognised in the industry as a regular author & presenter as well as being involved in a number of technical committees. Julie has decades of experience in advising clients and industry in the areas of superannuation structuring and advice, taxation, succession and estate planning. When it comes to superannuation, her clients range from large APRA funds right through to SMSF's.

Justin Micale is a dynamic leader with over 30 years of experience at the ATO. He continues to be at the forefront of driving transformational change in the way the ATO manages and treats risks. His focus is client centric, ensuring outcomes are achieved while building strong professional relationships. Justin has led the development and implementation of compliance and engagement strategies for large scale and diverse client groups in a variety of senior roles within the Client Engagement Group. In his role of Assistant Commissioner of the self-managed super fund segment Justin continues to support the sector and safeguard the integrity of the self-managed super fund system.

Tim Miller is the Education Manager at SuperGuardian and is one of Australia's leading SMSF educators and presenters with over 23 years' experience in the Superannuation industry. His experience has been gained through providing legislative and compliance support to thousands of Trustees, Accountants and Financial Planners since joining the SMSF sector in 1999. In addition to servicing the needs of SMSF clients, his practical and personable approach to compliance has made him a regular presenter on the SMSF circuit. Tim regularly presents at the major SMSF conferences and events, contributes to various trade and general publications and authored of one of the original subjects of the SMSF Association Graduate Certificate delivered through the University of Adelaide and Kaplan, this was also adopted as part of the Chartered Accountants Australia and New Zealand ANZ SMSF specialist program. Tim's work in the professional development space has resulted in

SuperGuardian being recognised as an SMSF Association Accredited Educator.

Nick Panos, CTA, is an experienced specialist solicitor with over 32 years in practice and is also the principal of N. Panos & Associates a highly respected and progressive boutique law firm. He specialises in all areas of tax law, superannuation (with particular emphasis on SMSFs), business and company law, estate planning, business succession planning, asset protection planning, trusts and general commercial matters. Nicholas' clients include small to medium size enterprises and high net worth individuals. He holds a Bachelor of Economics Degree, a Bachelor of Laws (Honours) Degree and a Masters of Law Degree all from the University of Sydney. Nicholas has been accredited by the Law Society as a Business and Personal Taxation Law specialist, is a member of the Law Society, a member of the Law Society Specialist Accreditation Business and Personal Taxation Law Advisory Committee, a Chartered Tax Advisor of The Tax Institute and a member of The Tax Institute Professional Development Committee.

Jemma Sanderson, CTA, is a Director of Cooper Partners Financial Services, heading up their SMSF specialist services. Jemma provides strategic advice on SMSFs, estate planning and wealth management to clients, as well as technical support to accounting, legal and financial planning groups. Jemma is a regular presenter on superannuation and SMSFs for professional bodies across Australia, and is the author of the popular publication "SMSF Guide", published by the Taxation Institute, currently in its ninth edition and the author and convener of the Taxation Institute's Graduate Diploma of Applied Tax Law Advanced Superannuation Unit. In August 2019 she was named for the third year in a row as the SMSF Adviser of the Year at the National Women in Finance awards. In February 2018 she was recognised for her contribution to the SMSF industry by receiving the 2017 Chairman's Award for the SMSF Association.

Shirley Schaefer is an auditor by training and a SMSF expert by choice. Shirley is a regular speaker at SMSF & Audit conferences. She provides SMSF competency training for accountants

and auditors and is the co-author of the Thomson Reuters SMSF Audit Guide. She is an Accredited Specialist Adviser, Accredited Specialist Auditor and Fellow of the Self Managed Superannuation Fund Professionals Association of Australia (SMSFA); a Fellow of the Association of Superannuation Funds Australia (ASFA); a Fellow of the Institute of Chartered Accountants in Australia (ICAA), a Registered Company Auditor and a Registered SMSF Auditor.

Julie Steed, Senior Technical Services Manager at Australian Executor Trustees, has more than 30 years' experience in the superannuation industry as a technical specialist, consultant and client services manager. Julie is responsible for the provision of superannuation technical information, specialising in small funds. Julie is passionate about helping people with superannuation and is actively involved in educational aspects of the industry, for both practitioners and individuals. Julie is a Senior Fellow of Finsia, a Fellow of ASFA and an accredited SMSF Specialist Advisor™ with the SMSF Association. Julie was awarded the SMSF Association's 2020 Chair Award for outstanding contribution to the SMSF industry.

Liz Westover, FTI, is a Partner and the National SMSF Leader at Deloitte. She is responsible for the firm's SMSF service offering providing compliance and advisory services to the firm's clients. Liz has extensive experience in superannuation, having previously held positions at PwC and as Head of Superannuation at Chartered Accountants ANZ. She has strong capabilities on the technical application of superannuation and associated tax laws. She is a regular commentator on superannuation issues with mainstream and social media and has authored blogs and articles on superannuation and related issues for many years. Liz has been heavily involved in superannuation policy development and advocacy, regularly liaising and consulting with Government, regulators and stakeholders on technical, legislative and policy matters. She is a Fellow of The Tax Institute, a Fellow Chartered Accountant, CA SMSF specialist and holds a Master of Legal Studies from the University of New South Wales and a Bachelor of Business from the University of South Australia.



Event information

Confirmation of registration

Please note you will receive two separate emails in the form of a confirmation email and tax invoice at the time of payment and registration completion.

Continuing Professional Development

Attendance at the conference counts for 8 hours of Continuing Professional Development with The Tax Institute.

The Tax Institute's Attendee Hub

This event will be accessible to all delegates via our dedicated Attendee Hub. Program information, materials (technical papers and presentations), survey forms and more will be available via The Tax Institute's virtual Attendee Hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the Attendee Hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual Attendee Hub by email.

Delegate list

A delegate list will be included on the Attendee Hub to assist with networking. Please indicate at the time of registration if you do not want your name to be included. Alternatively, you can edit your profile visibility settings in the Virtual Attendee Hub at any time during the event.

Cancellation Policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

Privacy

We take your privacy seriously, and our policy can be viewed at: www.taxinstitute.com.au/privacypolicy.

For further information regarding this event, please contact the Events Team on 1300 829 338 or email nationalevents@taxinstitute.com.au

For registration enquiries, please contact customeradmin@taxinstitute.com.au





Superannuation Intensive Registration form

A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

1 Registration

Full conference registration

	Member	New member*	Non-member
Early bird registration Received on or before 4 March 2022	<input type="checkbox"/> \$900	<input type="checkbox"/> \$1,240	<input type="checkbox"/> \$1,200
Standard registration Received after 4 March 2022	<input type="checkbox"/> \$1,100	<input type="checkbox"/> \$1,440	<input type="checkbox"/> \$1,300

Group discounts

Purchase three full registrations (early bird or standard) and receive a fourth full registration for free. The free registration must be of equal or less value to the paid registrations.

This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together.

For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

Promotional code:

*Become a member and save!

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and save with:

- up to 50% off membership to 30 June 2023
- member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at info.taxinstitute.com.au/membership.

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature:

2 Delegate contact details If your member details are up-to-date, you can skip this section Member no.:

Title: Mr Mrs Miss Ms Other (please specify) Date of birth:

First name: Last name:

Position: Company:

Address:

Suburb: State: Postcode:

Telephone: Fax:

Mobile: Email:

Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking purposes.

3 Payment method

- Cheque payable to The Tax Institute (in Australian dollars)
- Credit card Card type: AMEX Visa MasterCard Diners

Name on card:

Card no.: Expiry date: Cardholder's signature:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

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