



# SMSF AUDITORS ASSOCIATION OF AUSTRALIA



## Auditors Day - Melbourne & Sydney

SMSF Auditors Association of Australia Ltd presents it's first full day event for SMSF Auditors.

## SMSF Auditors Association of Australia

SMSF auditors were not being represented solely by any one professional body. Hence on 3rd July 2018, 5 SMSF auditors got together and set up a company limited by guarantee to benefit all SMSF Auditors. Their first agenda was to get together and lodge a submission to the treasury on their move to 3 year audit cycle.

SMSFAAA.com.au is only for SMSF Auditors and intends to serve their fellow auditors with a low monthly fees of \$20. Membership runs from July to June each year. It insists it members follow the utmost level of professionalism and prosper together with sound and ethical professional development. Collaboration between members is an intelligent way to support each member to attain success.

### Seminars

#### SMSF Auditors Day - Melbourne - 6 CPD hours

**Price:** \$275 for Members & \$495 for Non-Members

**Venue:** Pullman & Mercure Albert Park 65  
Queens Road Melbourne 3004

**Date:** 20 March 2020

**Timings:** 9:00 AM to 5:00 PM



#### SMSF Auditors Day - Sydney - 6 CPD hours

**Price:** \$275 for Members & \$495 for Non-Members

**Venue:** Hilton Sydney 488 George St,  
Sydney NSW 2000

**Date:** 27 March 2020

**Timings:** 9:00 AM to 5:00 PM



# Proposed Agenda

Time	Topic/Activity	Melbourne Speakers	Sydney Speakers
08.00 am - 09.00 am	• <b>Seminar Door Opens: Arrival Tea &amp; Coffee - Registration</b>		
09.00 am - 09.15 am	• Opening Statement from SMSF AAA - President		
09.15 am - 10.00 am	• How to audit a fund that has an LRBA in place - Including the new Total Super Balance Rules of repayment of Loan	<b>Deanne Firth</b>	<b>Deanne Firth</b>
10.00 am - 11.00 am	• Audit issues re contributions to a SMSF - Who can contribute, how much & what records must be kept	<b>Rohan Mansfield</b>	
	• Legitimate contributions to the fund - Who can contribute, how much & what records must be kept		<b>Mark Wilkinson</b>
11.00 am - 11.30 am	• <b>Morning Tea Break</b>		
11.30 am - 12.15 pm	• Death Benefits - Auditors Role where a member has died & how to audit pension assets of the fund	<b>Julie Dolan</b>	<b>Julie Dolan</b>
12.15 pm - 01.00 pm	• Australian Auditing Standards that apply to SMSF's and Part A Audit Report Qualifications	<b>Manoj Abichandani</b>	
	• Sole Purpose Test and Auditor Preservation		<b>Peter Bobbin</b>
01.00 pm - 02.00 pm	• <b>Lunch Break</b>		
02.00 pm - 02.45 pm	• Non-Arms length Income - what it is and when should the Auditor be worried that SMSF is paying the correct rate of tax	<b>Andrea Carrick</b>	
	• Australian Auditing Standards that apply to SMSF's and what are Part A Audit Report qualifications		<b>Manoj Abichandani</b>
02.45 pm - 03.30 pm	• Auditor "Watch out", there is Property In the fund	<b>Phil Broderick / Melissa Colaluca</b>	
	• Non-Arms length Income - what it is and when should the Auditor be worried that SMSF is paying the correct rate of tax		<b>Brooke Hepburn - Rogers</b>
03.30 pm - 04.00 pm	• <b>Afternoon Tea Break</b>		
04.00 pm - 05.00 pm	• An audit of SMSF Pensions post reforms – what you should look out for	<b>Nicholas Ali</b>	<b>Phil La Greca</b>
05.00 pm - 06.00 pm	• <b>Seminar Ends - Complimentary Drinks &amp; Social</b>		

## Speakers



### Deanne Firth - Principal -Tactical Super

Deanne Firth FCA is the Founder and Director of Tactical Super, an award-winning chartered accounting firm specialising in the audit of Self Managed Super Funds. Being an expert in the field of SMSF audits, Deanne imparts her knowledge by speaking at a variety of conferences and webinars on superannuation and taxation, including CCH Learning, CPA, and CA. She also founded her own professional development firm, Effective PD, which offers accountants weekly pre-recorded webinars on current tax and superannuation issues. She is also a prolific contributor for publications like Accountants Daily and SMSF Adviser.



### Rohan Mansfield - Principal Adviser - LDB Financial Group

Rohan commenced with LDB in July 2018 after spending 17 years working with one of Australia's largest accounting firms in their superannuation division. Rohan provides superannuation accounting and advisory services to self-managed superannuation fund (SMSF) trustees. He specialises in giving advice to trustees in relation to contributions, pensions and investments. He does regular public speaking on superannuation topics and has presented for organisations such as CPA Australia, Television Education Network and Legalwise.



### Julie Dolan - SMSF Director - KPMG

Julie has extensive experience of over 25 years in the SMSF Industry and has been part of the SMSF journey from the start. She has deep experience in multiple facets of the accounting, wealth and SMSF sector and has been involved in many roles within these sectors. For many years she has provided strategic / technical support, education and consulting services to hundreds of accountants, advisers and lawyers around Australia. She also regularly writes for industry publications and has also had the pleasure of educating thousands of SMSF Trustees.



### **Manoj Abichandani - SMSF Technical Director - Deed Dot Com Dot Au Pty Ltd**

Manoj has worked in SMSF since 1988 - over 32 years - and is SMSF Specialist (UNSW). He was providing high level advisory services to over 600 funds in his own 3 partner CPA tax practice for 19 years and has written the first Australian online SMSF Audit software. He currently works as SMSF Technical Support Team Leader at [www.trusted.com.au](http://www.trusted.com.au). He has hands on knowledge on what happens in a tax practice on high level of SMSF practical issues.



### **Andrea Carrick- Director - AG Tax Lawyers Pty Ltd**

Andrea has over 12 years' experience advising SMEs and high net worth individuals in all areas of taxation including income tax, CGT, GST and state taxation matters. She advises both corporate and private family businesses across a wide range of industries, focusing on complex business restructuring, commercial transactions and estate and succession planning. Andrea also has a wealth of experience liaising and negotiating with the ATO and Revenue Offices on behalf of clients in relation to audits and investigations, objections and private ruling applications.



### **Phil Broderick - Principal - Sladen Legal**

Phil heads Sladen Legal's superannuation team. He is a Chartered Tax Advisor (CTA), a SMSF Specialist Advisor (SSA) and a member (and past member) of multiple superannuation related committees. Phil is a regular author and presenter. He frequently liaises with the Australian Taxation Office (ATO) and Treasury in relation the implementation and administration of the superannuation laws.



### **Nicholas Ali - Executive Manager - Super Concepts**

A professional, highly-skilled SMSF advisory specialist with more than 12 years of experience providing strategic advice to SMSF Trustees and Intermediaries.

An excellent communicator with outstanding technical knowledge and strong leadership and organisational skills.



### **Mark Wilkinson - Partner - BDO**

Mark is a superannuation partner in our business services team in BDO's Sydney office and an authorised representative of BDO Private Wealth Advisers (East Coast) Pty Ltd. He is one of the leading members of the BDO Superannuation team in Australia and has been providing superannuation and retirement planning advice for more than 30 years. As a superannuation specialist, Mark provides strategic superannuation advice on how the State and Federal legislation impact on the areas of superannuation, retirement, estate and succession planning for clients as they build their wealth en route to retirement.



### **Peter Bobbin - Principal Lawyer - Coleman Greig Lawyers**

Peter Bobbin is a Principal Lawyer at Coleman Greig Lawyers. Peter specialises in the financial services industry as well as federal and state taxation law, company, estate and superannuation law. He was formerly a taxation accountant with Coopers & Lybrand (Australia and UK) and Peat Marwick Mitchell (Sydney) and is a former lecturer in the LLM (Taxation) Degree at the University of Western Sydney, as well as being a regular guest lecturer at a wide range of universities, institutes and associations.



### **Brooke Hepburn-Rogers - Director - Stellar Super**

Brooke Hepburn-Rogers has over 20 years' specialist experience within the Self-Managed Super Fund industry. She established her career as an SMSF Association Specialist Advisor (SSA™) and SMSF Specialist Auditor (SSAUD®) in Queensland and New South Wales. She is a Member of the Institute of Public Accountants, Registered Tax Agent and currently part of the newly appointed ACT Chair of the SMSF Association. She consults with various Professional Peers and Governing Bodies, as well as other Accounting Bodies, and participates as a Presenter at a number of various events within the Industry. Most recently at the SMSF National Conference 2020.



### **Philip La Greca - Executive Manager - Super Concepts**

Philip La Greca is the Executive Manager – SMSF Technical & Strategic Solutions for SuperConcepts Pty Ltd, a specialist in self-managed superannuation fund services. He has been in the superannuation industry since 1980 and worked through the constant changes that have occurred during that time. Philip has responsibility for the SuperConcepts services relating to provision of compliance, technical and consulting advice for the administration of SMSFs, Here also delivers a range of education courses for advisers and trustees on superannuation matters.

# Registration Form

## 1. Choose a session

**Melbourne:**  20 March 2020

**Sydney:**  27 March 2020

**Time :** 09.00 AM to 5.00 PM

## 2. Your details

Firm \_\_\_\_\_

Address \_\_\_\_\_

Pcode \_\_\_\_\_ Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

## 3. Attendees

**Name:** Mr/Mrs/Miss/Dr \_\_\_\_\_

**Email:** \_\_\_\_\_

**SMSF Auditor Number** \_\_\_\_\_

**Name:** Mr/Mrs/Miss/Dr \_\_\_\_\_

**Email:** \_\_\_\_\_

**SMSF Auditor Number** \_\_\_\_\_

## 4. Fee for Seminar is \$275 for Members & \$495 for Non-Members

**ASIC Approved Auditor - Please add membership Fees of \$20 + GST per month from date of joining to 30th June 2020.**

a) Cheque, made payable to **SMSF Auditors Association of Australia**

**Mailing Address** - Suite 3.04, Level 3, 29-31 Solent Circuit Baulkham Hills NSW 2153

b) Paying by Credit Card at <https://www.smsfaaa.com.au/Home/Seminar>

or provide the credit card details through email to [awan@smsfaaa.com.au](mailto:awan@smsfaaa.com.au)

c) Paying by Credit Card or provide the credit card details through email to [awan@smsfaaa.com.au](mailto:awan@smsfaaa.com.au)

Visa Card / Mastercard (circle one)

Name on Credit Card \_\_\_\_\_

Credit Card Number

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Expiry Date

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Month

Year

CVV Number

Signature of Card Holder \_\_\_\_\_

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

Please deposit the funds directly into following bank account:

Account Name: **SMSF Auditors Association of Australia**

Bank: **NAB** BSB: **082-167** Account No.: **406752683**

After Payment: Email Electronic Bank Receipt to [awan@smsfaaa.com.au](mailto:awan@smsfaaa.com.au)

**For any further enquiry – Contact Awan at (02) 8315 7796**

## 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 Awan immediately on (02) 8315 7796.

## Privacy Statement

[smsfaaa.com.au](https://www.smsfaaa.com.au) (SMSF Auditors Association of Australia) protects the privacy and security of information provided by you.