

# The Presenters



**Manoj Abichandani**

SSA, SSAud, CTA, FIPA

Superannuation Technical Director  
[www.trustdeed.com.au](http://www.trustdeed.com.au)

Creator of Australia's first Cloud based  
SMSF audit software  
[www.onlinesmsfaudit.com.au](http://www.onlinesmsfaudit.com.au)



**Mark Wilkinson**

CA, SSA

Director  
**Wilkinson Superannuation**



**Peter Bobbin**

Practice Areas: Taxation  
Trusts  
Superannuation

Head of Personal Legal Services,  
**Rockwell Olivier**



**Sharif Eldebs**

Principal, Assured Super

Member of the Superannuation National  
Audit Consultative Committee



**Deanne Firth**

FCA

Director  
**Tactical Super**

 **Online SMSF Audit**  
[www.onlinesmsfaudit.com.au](http://www.onlinesmsfaudit.com.au)

# SMSF Strategies Summer Series Seminar

The concept and content of the 2014 Summer Series Seminar have been developed by experienced SMSF professionals who have special expertise in the accounting and audit profession. The seminar provides a platform where you can learn from experts and incorporate the knowledge directly into your business.

# Seminar Locations and Dates

## Melbourne

**Tuesday 25 November 2014**

Stamford Plaza Melbourne  
111 Little Collins Street  
MELBOURNE VIC 3000

## Sydney

**Thursday 27 November 2014**

Mercure Hotel,  
106 Hassall Street, Rosehill  
NSW 2142

## Brisbane

**Tuesday 2 December 2014**

Stamford Plaza Brisbane  
Corner of Edward and  
Margaret Streets, Brisbane  
QLD 4000

## Sydney

**Thursday 4 December 2014**

PARKROYAL Darling Harbour  
150 Day Street, Sydney  
NSW 2000

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

+

One Account Based Pension document  
worth \$165 from [www.trustdeed.com.au](http://www.trustdeed.com.au)

+

2 hours workshop - Be a better auditor, You  
have the knowledge, we have the tools -  
\$110

=

**You can get back value worth \$440  
PLUS 7.5 CPD hours**

**2 hours workshop - Be a better auditor, You  
have the knowledge, we have the tools.**

Given the response we have received from some of the SMSF auditors who are using our system in full enhanced mode, auditors can now think of doubling or tripling their SMSF business due to efficiencies being achieved by using this online tool.

This workshop will help SMSF auditors to grasp the full power of the tool and reduce audit time to more than half. However some auditors are using only some parts of the software. We are organising a workshop where not more than 10 SMSF auditors will learn how simple it is to use this online tool; including how integrating your website with ours will benefit you in getting more customers.

### **About the moderator: Manoj Abichandani**

Manoj created [onlinesmsfaudit.com.au](http://onlinesmsfaudit.com.au), Australia's first Cloud based SMSF audit software and knows the software inside out.

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

# Proposed Agenda

## Sydney Seminars

### 6.45 am to 7.00 am:

Registration and Welcome Tea & Coffee

### 7.00 am to 9.00 am:

Workshop – Be a better auditor, You have the knowledge, we have the tools.

### 9.00 am to 9.30 am:

Morning Tea & Coffee

### 9.30 am to 11.00 am:

Major tax deductions available to a Super Fund - **Mark Wilkinson**

### 11.00 am to 11.30 am:

Tea & Coffee and Networking

### 11.30 am to 1.00 pm:

Twisted tail of in-house assets in a SMSF – **Manoj Abichandani**

### 1.00 pm to 2.00 pm:

Lunch Break

### 2.00 pm to 3.30 pm:

To be advised

### 3.30 pm to 4.00 pm:

Afternoon Tea & Coffee and Networking

### 4.00 pm to 5.30 pm:

The safe super myth exploded and how in fact to make it safe-  
**Peter Bobbin**

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Discussing certain SMSF audit issues relating to: - **Sharif Eldebs**

### 11.00 am to 11.30 am:

Tea & Coffee and Networking

### 11.30 am to 1.00 pm:

Twisted tail of in-house assets in a SMSF – **Manoj Abichandani**

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A game changing year for SMSFs -  
**Deanne Firth**

## Brisbane Seminar

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**Deanne Firth**

- Delegates, who are paying \$330 for the seminar, will not be required to pay additional \$110 for the workshop. This is complimentary for them.
- Please visit <https://www.onlinesmsfaudit.com.au/SeminarBooking.aspx> for detailed description about each session and topic.

# Session Information

## Twisted tail of in-house assets in a SMSF

In-house asset rule requires trustees of a superannuation fund to manage the investments of the fund so that the market value of its in-house assets does not exceed 5% of the fund's total assets market value.

In this presentation, Manoj will explain; what is an in-house asset, which SMSF assets are exempted from being considered as an in-house asset and how trustees can unknowingly breach this rule and what remedial action is required under SIS Act to avoid paying penalties.

SMSF auditors note that 18.3% of all contraventions and 27.2% by value of assets of all contraventions, makes the breach of "in-house asset" rule as the largest type of contravention reported by auditors, this presentation will help them to recognize an in-house asset problem in a fund and how to uncover these breaches and report them in a contravention report.

This is an advanced topic and prior knowledge of basic concepts is a pre-requisite by delegates.

**Speaker: Manoj Abichandani**

Superannuation Technical Director [www.trustdeed.com.au](http://www.trustdeed.com.au),  
Creator of Australia's first Cloud based SMSF audit software  
[www.onlinesmsfaudit.com.au](http://www.onlinesmsfaudit.com.au)

## Major tax deductions available to a Super Fund

This session will examine the deductions that are available to a superannuation fund over the life of the fund.

Specifically we will examine deductions available for setting the fund up, deductions available for fund maintenance, specific deductions available to superannuation funds under statutory provisions and deductions that become available on the death of a member.

**Speaker: Mark Wilkinson**

Director, Wilkinson Superannuation

## Discussing certain SMSF audit issues relating to

- Acceptance of contributions
- Acquisitions of assets from related parties
- Business Real Property and Vacant Land
- Partnerships and Part 8 Associates
- Pension payments and Partial Commutations
- Taxation issues including ECPI deductions and tax losses
- Mental Incapacity / Death Benefits
- Key changes made to GS009 in September 2013

**Speaker: Sharif Eldebs**

Principal, Assured Super, Member of the Superannuation National Audit Consultative Committee

## The safe super myth exploded and how in fact to make it safe

**Speaker: Peter Bobbin**

Head of Personal Legal Services,  
Rockwell Olivier

## A game changing year for SMSFs

The penalty regime is here, insurance changes have commenced, the transitional period is almost over for collectibles and personal use assets and the ATO is looking into related party LRBAs with a number of private rulings drawing attention to "non arms length income".

On completion of this seminar attendees will have an understanding of the new environment that SMSFs are operating in focusing on the administrative penalty regime and related party LRBAs.

**Speaker: Deanne Firth**

Director, Tactical Super

# Registration Form

## 1. Choose a session

- ☐ Melbourne at Stamford Plaza Melbourne – 25 November 2014
- ☐ Sydney at Mercure Hotel - 27 November 2014
- ☐ Brisbane at Stamford Plaza Brisbane- 2 December 2014
- ☐ Sydney at PARKROYAL Darling Harbour- 4 December 2014

## 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 \$330 Incl. GST ☐

Fee for workshop is \$110 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 [rashmi@trustdeed.com.au](mailto:rashmi@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

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 [rashmi@trustdeed.com.au](mailto:rashmi@trustdeed.com.au)

For any further enquiry – Contact Rashmi 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 Rashmi 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, you must inform us. However a substitute participant will be accepted anytime.

## Cancellations

More than 7 full working days before the seminar:

- 100% Refund

Within 7 working days of the seminar:

- No refunds will be available for cancellation, although credit to audit 10 SMSF on cloud worth \$165 and One SMSF Trustdeed from [www.trustdeed.com.au](http://www.trustdeed.com.au) worth \$125 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.