

2022 NATIONAL SMSF RETREAT

7 - 9 SEPT

MANTRA ON SALT BEACH, KINGSCLIFF

PROGRAM



Wednesday 7 & Thursday 8 September

Friday 9 September

Speaker Bios

Wednesday 7 September 2022

Time	Session
4.15pm	Registration
5.00pm	Welcome Networking Drinks Husk Distillers
7.00pm	Transfer to Mantra

Thursday 8 September 2022

Time	Session	Presenter
8.30am	Registration	
8.45am	Event Commences	
9.00am	IPA Welcome and Update	Prof Andrew Conway FIPA CEO, Institute of Public Accountants
9.30am	Setting up a SMSF <ul style="list-style-type: none"> • When to set up a SMSF • Members & Trustees • How to set up a SMSF 	Shirley Schaefer Partner - BDO
10.30am	Morning Tea	
11.00am	Wealth Accumulation & Contributions <ul style="list-style-type: none"> • What contributions can be made & limits • Contribution acceptance rules • Taxation of contributions • Contribution Strategies 	Shirley Schaefer Partner - BDO
12.30pm	Lunch	
1.30pm	Managing Small SMSF Funds with the Power of IPA Books+	John Gajewski & Rajesh Maharajan IPA Books+
2.00pm	Superannuation death benefit planning – navigating the ever increasing minefield! - Part 1 Implementing estate planning arrangements for superannuation death benefits has never been more complicated. Every element of the superannuation death benefit plan has been the subject of attack in various court cases, and the payment of superannuation death benefits is a key focus of almost every estate challenge. In this workshop will discuss the lessons to be learned from the recent cases and explore the common mistakes and how not to make them and what to look for now and how to fix it.	Clinton Jackson Partner - Cooper Grace Ward
3.15pm	Afternoon Tea	
3.30pm	Superannuation death benefit planning – navigating the ever increasing minefield! - Part 2	Clinton Jackson Partner - Cooper Grace Ward
4.45pm	Event Concludes	
6.00pm	Dinner	

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Time	Session	Presenter
8.00am	Registration	
8.15am	Event Commences	
8.30am	Superannuation Benefits & Pensions <ul style="list-style-type: none">• When benefits/pensions can be paid• How benefits/pensions can be paid• Benefit Documentation• Taxation of Benefits	Shirley Schaefer Partner - BDO
9.30am	SMSF Investing - What are the rules - Part 1 <ul style="list-style-type: none">• Investment Restrictions ("ATO says NO")• Alternative Investments/Investment Classes• In House Assets• When things go wrong?	Katrina Fletcher Managing Director - Elite Super Shirley Schaefer Partner - BDO
10.45am	Morning Tea	
11.00am	SMSF Investing - What are the rules - Part 2 <ul style="list-style-type: none">• Investment Restrictions ("ATO says NO")• Alternative Investments/Investment Classes• In House Assets• When things go wrong?	Katrina Fletcher Managing Director - Elite Super Shirley Schaefer Partner - BDO
12.30pm	Lunch	
1.30pm	SMSFs the Audit Function & the ATO	Katrina Fletcher Managing Director - Elite Super
2.30pm	Winding up a SMSF <ul style="list-style-type: none">• When to wind up a SMSF• What are the options?• How to wind up a SMSF	Shirley Schaefer Partner - BDO
3.30pm	Q & A with the Experts	Katrina Fletcher Managing Director - Elite Super Shirley Schaefer Partner - BDO
4.00pm	Event Concludes	

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Shirley Schaefer

Partner - BDO

Shirley is an auditor by training and a SMSF expert by choice. She established a separate Superannuation division at BDO in 1996, recognizing the need to provide high quality technical services to clients with self-managed superannuation funds.

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.

Shirley is the winner of the multiple SMSF and SMSF audit awards in 2017 & 2018.



Katrina Fletcher

Managing Director - Elite Super

Katrina has over 28 years experience in the SMSF & Accounting Industry; with a Bachelor of Business with ACU and the majority of a Law Degree with UNE. Holding specialist membership accreditation with the SMSF Association as a SMSF Specialist Advisor and SMSF Specialist Auditor. She's also a member of the Institute of Chartered Accountants Australia and NZ (CA ANZ). She chairs the Northern Region NSW SMSF Association local chapter, and sits on the SMSF Auditors professional Association Stakeholders group with the ATO. Recently Katrina was awarded Auditor of the Year (2021) from the Women in Finance Awards and Superannuation Auditor of the year (2020) from the Australian Accounting Awards. Katrina has branched into SMSF audit training and speaking/presenting as well as SMSF auditing.



Clinton Jackson

Partner - Cooper Grace Ward

Clinton advises his clients on an extensive range of commercial and corporate matters, business mergers, acquisitions and sales, tax and structuring issues, self-managed superannuation, asset protection and succession, restructuring and exit strategies.

Clinton's unique range of expertise enables him to assist his clients with both their personal and business legal issues and to advise through all phases of the business/investment lifecycle - from start up, growth, expansion, transition and exit.

He is passionate about ensuring his clients receive the most accurate, cost effective and commercial advice. Clinton is an accredited specialist superannuation adviser and is a highly sought after speaker who regularly presents at seminars and conferences on a range of topics.