



SUPERANNUATION STRATEGIES SEMINAR

Grow your superannuation knowledge



TUESDAY 23 JULY 2024

Live in Melbourne
(Livestream option available)

tagfinancial.com.au/seminar

WHAT'S INCLUDED

Exclusive Live Seminar

Join us at the RACV Club in Melbourne CBD for great content, delicious food and in-depth discussions or attend our livestream option.

Strategy Packed Presentations

Learn recent and upcoming changes to superannuation, strategy options with detailed case studies and Q&A opportunities in each session.

Expert Presenters

Join our leading industry specialists, Brenda Hutchinson and Michelle Griffiths, as they share their passion, personal insights and explore practical case studies to bring a real-life perspective to key super issues.

Live Q&A

Ask our expert presenters questions throughout the day and take the opportunity to engage with our panel of respected experts to answer all your complex superannuation queries.

Handy Seminar Toolkit

Includes valuable online information: session slides, white papers, session recordings, standard documents, SMSF audit workpapers and compliance checklists.

7 CPD Hours

Receive up to 7.0 CPD points: CPA, CA ANZ, SMSF Assoc., FPA an IPA, assisting you in staying on top of your professional development requirements.



PRESENTERS



Michelle Griffiths, CA

Partner
Investment Advisory
& Wealth



Brenda Hutchinson, CPA

Partner
Superannuation
Advisory & Audit

WRITERS



Jason Roccasalvo, CA

Partner
Superannuation
Advisory & Audit



Emma Partenza, CPA, SSA

Manager
Superannuation
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TOPICS

Supercharging Retirement Wealth: Contributions & structuring.

Strategies to help your clients compound their super savings to reach their retirement goals:

- Use and interaction of different structures.
- Investment vehicles both inside and outside super for the best result.
- Keeping it in the family group with related party transactions.
- Making the most of the SBCGT provisions.

NALI/E:

How the changes could impact you.

Sirens sounded when the Government first shifted focus on non-arm's length income and expense rules. Find out how they may affect you:

- Contentious circumstances and how to navigate them.
- What are the penalties.
- How the penalties will be assessed.

Super Savvy Borrowing:

Unlocking borrowing opportunities in super.

Borrowing is a complex area of superannuation legislation. We constantly see issues arise through all stages of the borrowing process, including:

- Managing cashflow and repayment obligations.
- Settlement issues.
- Timing issues around providing advice.
- What can/cannot be done with assets.

Multi-Generational Planning: Proven strategies for wealth preservation.

It is crucial to ensure client's wealth transfers how they want:

- Detangle the complexities of estate planning.
- Dealing with lumpy assets.
- Handle where fund members no longer have capacity.
- Ensure steps in the estate planning process are not overlooked.
- Deal with issues around BDBN.

Retirement with Confidence: Essential planning strategies for success.

When a client retires, is it as simple as "starting a pension" or is this the tip of the iceberg? Let us show you strategies for different stages of retirement planning:

- Retirement goal setting.
- Strategies that can be employed in retirement.
- Handy checklist to ensure all stages of retirement are planned for.



The \$3M Super Challenge: Optimising retirement savings.

The proposed additional tax on super balances above \$3M is slated to take effect from 1 July 2025. This session will examine:

- How it will work.
- What impact it will have on clients.
- Strategies we can consider to minimise the impacts on our client's super balances.

Expert Panel Discussion

Our panel will help you navigate the practical application of the superannuation changes, the strategies and is dedicated to answering all your superannuation queries.

**Bonus Webinar - Audit Insights:
A live webinar on the latest updates.**

Join us on Tuesday 20 August, 12-1pm, to hear about what's new in audit, how you can proactively manage client risk and mitigate audit issues.

PRICING

Melbourne (live event)

	Early Bird*	Regular
Initial Attendee	\$550	\$660
Extra Attendees	\$462pp	\$550pp

Livestream

Initial Attendee	\$495	\$550
Extra Attendees	\$385pp	\$440pp

*ends 30 June

CPD: Up to 7 hours

Level: Intermediate, Advanced.

Testimonial



"Well presented, informative and engaging - thank you."
Marita.

Register online at
tagfinancial.com.au/seminar



Full day of intensive and interactive superannuation training presented by industry experts.



Learn what is new and how to assist your clients to maximise their super.



Identify superannuation investment growth opportunities and learn how to implement strategies.

Register online at
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