

# 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.