



9th Annual SMSF Forum
9 October 2017
Quay West Melbourne Southbank

8:30am		
REGISTRATION		
8:45am	Welcome	Rob Jeremiah
9:00am – 9:45am	<p>Get with the new groove - Pensions after super reform:</p> <ul style="list-style-type: none">• Transition to retirement pensions – keep, commute convert? (and why we need to understand the definition of retirement)• Transfer balance cap – how it works in practice (with comments on the ATO proposal for events based reporting)• Valuation guidelines (just the facts, ma'am)• Exceeding the cap? Multiple funds – which one to keep? – How to max that cap! What about reserves? Some suggested strategies• Estate planning, reversionary pensions and the transfer balance cap (sorry: your cap dies with you!) – a word on this most significant aspect of the 1 July changes	Michael Jones CFMC
9:45am – 10:30am	<p>CGT transitional relief under the transfer balance cap regime</p> <p>In this session, Chris will consider various aspects of the CGT transitional relief, including:</p> <ul style="list-style-type: none">• what exactly the relief is• pre-conditions for its availability• which assets it applies to,• considerations in exercising the choice• practical examples of making the election and choosing not to make the election	Chris Balalovski
10:30am		
MORNING TEA		
10:50am -11:35am	<p>The latest issues with LRBAs</p> <p>In this session, Phil will consider the latest issues with limited recourse borrowing arrangements (LRBAs), including:</p> <ul style="list-style-type: none">• LRBAs and the transfer balance cap regime• How LRBAs are counted for the non-concessional cap	Phil Broderick Sladen Legal

	<ul style="list-style-type: none"> • LRBA's and the safe harbour rules - one year on What to do with related party LRBA loans that are not covered by the safe harbours 	
11:35am – 12:20pm	ATO presentation from Kasey MacFarlane, Assistant Commissioner, SMSF Segment	Moderated by SISFA
12:20pm – 12:35pm	What's new with SISFA	
12:35pm	LUNCH	
1:35pm – 2:20pm	Contributions changes under the new laws and strategies	Tim Wedd Crystal Wealth Partners
2:20pm – 3:05pm	<p>Death benefits and changes under the new laws In this session, Rebecca will consider the impact of the superannuation changes on the payment of death benefits and planning opportunities, including:</p> <ul style="list-style-type: none"> • ATO's latest views on cashing death benefits • Interaction between the \$1.6 million transfer balance cap and payment of death benefits • Treatment of reversionary pensions on death • What is required to ensure the pension is in fact reversionary • Differences between account-based and transition to retirement pensions on death • What happens to capped defined benefit income streams, such as market linked pensions, on death 	Rebecca James Magwicks
3:05pm	AFTERNOON TEA	
	Panel session / Open Mike	
	Moderated by Andrew Cullinan	
3:25pm – 4:15pm	<p>Panelists</p> <ul style="list-style-type: none"> • Michael Lorimer • Michael Jones • Theodora Elia Adams 	
4:15pm	Closing remarks – Rob Jeremiah	
4:20pm	NETWORKING DRINKS	