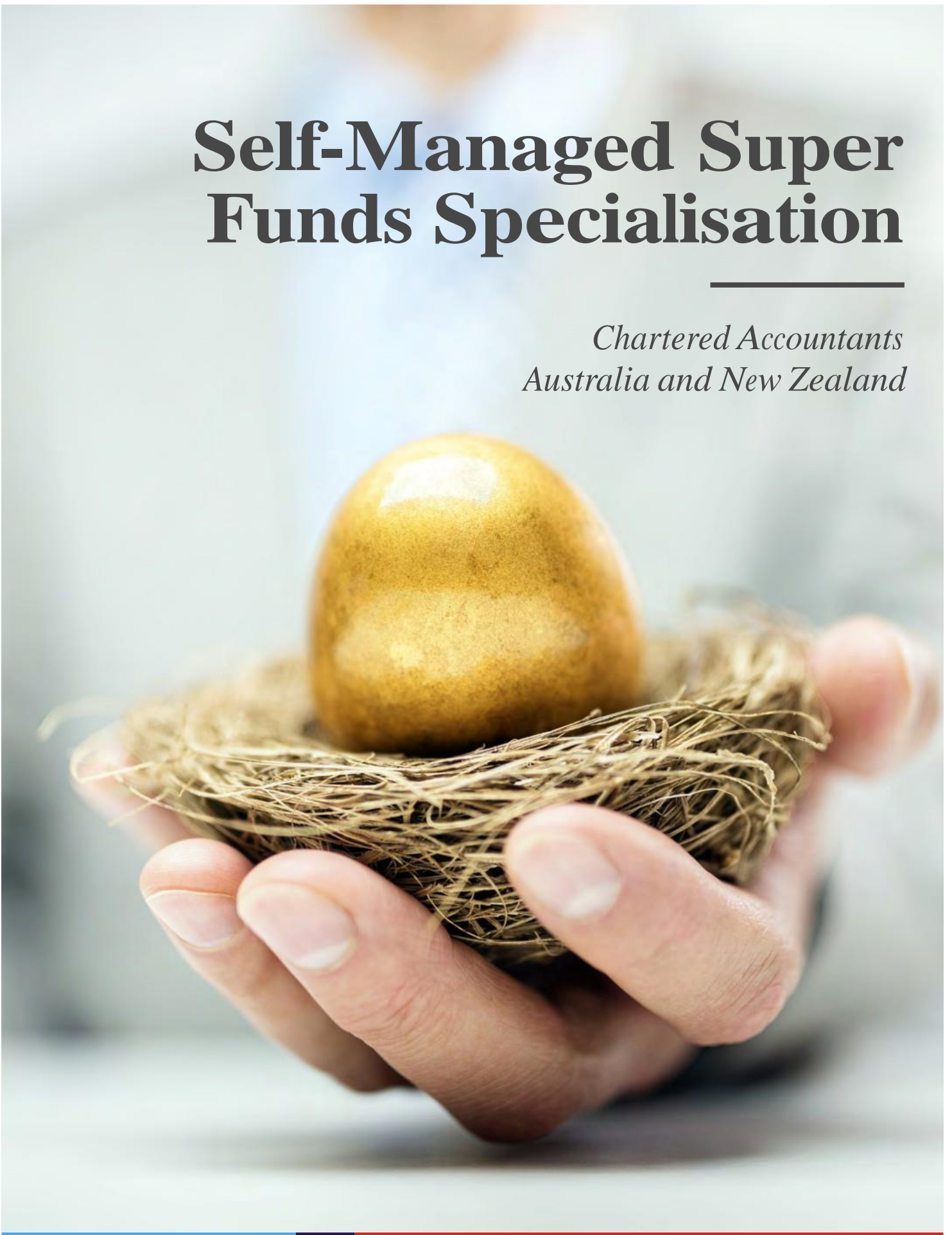


Self-Managed Super Funds Specialisation

*Chartered Accountants
Australia and New Zealand*



Self-Managed Super Funds Specialisation

Take the first step to gain formal recognition of your expertise as a CA SMSF Specialist. Offered through live online study that complements your practical experience, the specialisation education program can enhance your skills as you journey towards becoming a Specialist to build your personal brand, expand your network and help you realise new opportunities in this important niche area.

Become a trusted leader in Australian Self-Managed Super Funds

The CA Self-Managed Super Funds Specialisation Program is the pathway to becoming a CA SMSF Specialist. Open new doors in a complex and growing field that currently accounts for around 25% of the total funds invested in superannuation in Australia.

Designed to equip you with leading-edge technical knowledge, the program covers the latest legislative and administrative developments that impact SMSFs, trusts, taxation, estate planning and financial strategies.

Receive formal accreditation

The program is available to full Chartered Accountants ANZ members and affiliate members.

Upon successful completion of the program you can apply for formal accreditation as a CA SMSF Specialist (full CA members) or a SMSF Specialist (affiliate members).

Approximately 25% of Australia's Superannuation is held in Self-Managed Super Funds.

Consolidate your reputation

Being a recognised CA SMSF Specialist promotes you as an expert in this niche area, builds your reputation, and reflects your depth and breadth of knowledge.

Once accredited, you can add Specialist under your name on all correspondence, and you'll have the option to leverage the Chartered Accountants ANZ's specialist banner for your business and marketing collateral.

Being a recognised CA SMSF Specialist helps you establish a reputation that reflects your depth of knowledge.

Create new opportunities

CA SMSF Specialists are well placed to accept referrals from other practitioners, strategic partners, associated professionals and clients.

Stay informed

Being a CA SMSF Specialist helps you to connect with like-minded peers and keep up to date with issues affecting Self-Managed Super Funds.

As well as your exclusive invitations to educational events, your Specialisation status also entitles you to a 20% discount on the standard pricing for the CA ANZ SMSF conference.

Pathway to your Self-Managed Super Funds Specialisation

If you have worked in the area for at least four of the previous ten years you can complete the program through a live online course and assessments (Experienced Pathway).

This pathway is facilitated by the Australian Graduate School Of Management (AGSM) at the University of New South Wales.

Key dates

Experienced Pathway

The next intake

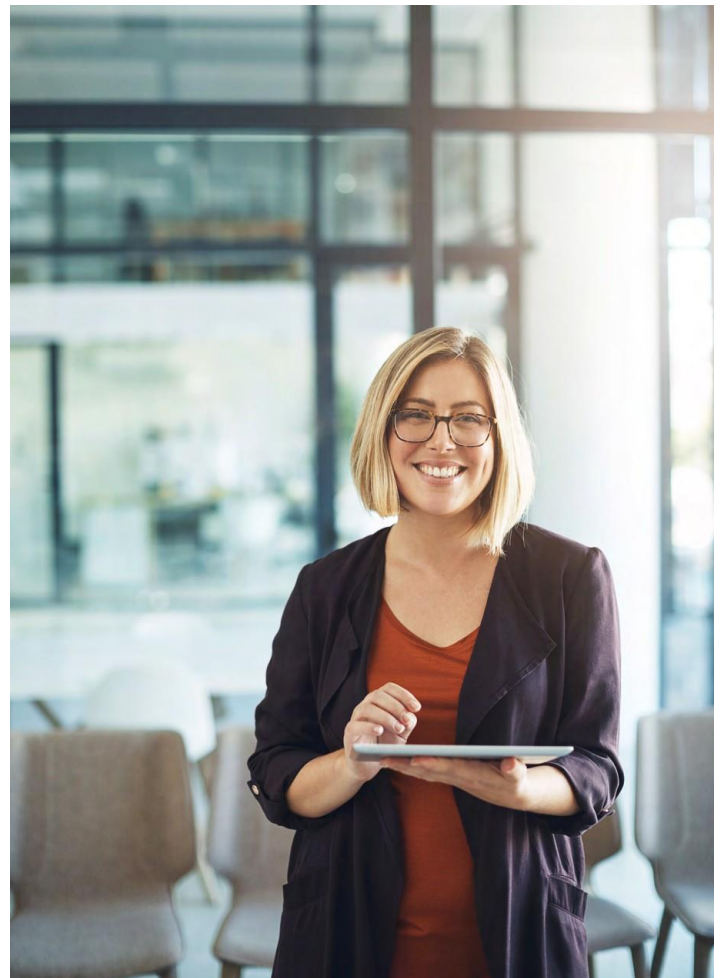
2022 Intake 2

Enrolment period	Wednesday 7 th September 2022 – Friday 30 th September 2022
Live online study commencement	Wednesday 12 October 2022 – Wednesday 30 November 2022
Assessment	Wednesday 30 November 2022

2023 Intake 1

Enrolment period	December 2022 – January 2023
Live online study commencement	February 2023
Assessment	March/April 2023

Sharpen your skills, build your personal brand, expand your network and realise new opportunities.



Entry requirements and pathway details

EXPERIENCED PATHWAY

Live online course and practical experience

Eligibility

To be eligible for accreditation through the Experienced Pathway you must be a Chartered Accountant or an Affiliate member with at least 4 years of practical experience in the area of Self-Managed Super Funds within the last 10 years. During this period, at least 40% of your role must have been related to Self-Managed Super Funds.

Course framework

The live online course is offered through the Australian Graduate School of Management (AGSM) at the University of New South Wales and is delivered over seven weeks. It includes the following 5 modules:

- SMSF Operating Standards – Contributions and Benefits
- SMSF Investment Standards
- Taxation – Contributions
- SMSF Entity Taxation
- Taxation and Benefit Payments

Workload and CPD hours

The course involves an eight-week study period, comprising:

Formal study – 1 hour orientation session in first week plus 2.5 hours per week for 6 weeks (16 hours)

Informal study – 10 hours

Project preparation and assessment – 14 hours

Total CPD hours: 40 hours

Delivery method

Live online

Course fees

UNSW AGSM course fee **\$2,075**

The above course fee is the discounted amount for CA ANZ members only. Please submit your pre-enrolment form to CA ANZ and you'll receive a code that you can use to apply this special rate to your enrolment.

Apply to become a CA SMSF Specialist and subscription fees

On successful completion of the program and required experience you can apply to CA ANZ to become a CA SMSF Specialist.*

Specialisation application fee (one off) \$232 incl. GST

Annual specialisation subscription fee \$280 incl. GST

Total member fee for program and application \$2,307 incl. GST

Ongoing annual specialisation subscription fee \$280 incl. GST

* The education program must have been completed within 5 years of the application to become a specialist.

Ongoing obligations

To maintain your accreditation as a CA SMSF Specialist, at least 40% of your future CPD must be undertaken in superannuation.

Be a Difference Maker

Find out more about the program

Read more about the Self-Managed Super Funds Specialisation and your pathway options.

READ MORE

[charteredaccountantsanz.com/smsf-specialisation](https://www.charteredaccountantsanz.com/smsf-specialisation)

Register your interest

Follow the link below to register your interest and access the pre-enrolment form. You'll then receive further information about the program and what you'll need for enrolment.

events.charteredaccountantsanz.com/SMSF-ROI

Part of our growing suite of specialisation programs

SMSF Specialisation is an innovative program offered by Chartered Accountants ANZ. Find out more about our full suite of programs that include Business Valuations, Risk, Financial Planning and Forensic Accounting

VISIT SPECIALISATIONS PAGE

[charteredaccountantsanz.com/learning-and-events/specialisations](https://www.charteredaccountantsanz.com/learning-and-events/specialisations)

The details of the Chartered Accountants ANZ Self-Manager Super Funds Specialisation Program were correct at the time of 1 September 2022 but are subject to change without notice. Chartered Accountants Australia and New Zealand (CA ANZ) reserves the right to amend any details at any time. Participation in the Chartered Accountants ANZ SMSF Specialisation Program is subject to CA ANZ's terms and conditions which are available at www.charteredaccountantsanz.com. The information in this document is of a general nature only and is not, and is not intended to be, advice. CA ANZ does not expect or invite any person to act or rely on any statement, view or opinion expressed in this document. No warranty is given as to the suitability of the Chartered Accountants ANZ SMSF Specialisation Program for you. To the fullest extent permitted by law, CA ANZ is not liable for any statement or opinion, or for any error or omission contained in this document and disclaims all warranties with regard to the information contained in it, including, without limitation, all implied warranties of fitness for a particular purpose. CA ANZ is not liable for any direct, indirect, special or consequential losses or damages of any kind, or loss of profit, loss or corruption of data, business interruption or indirect costs, arising out of or in connection with the use of this document or the information contained in it, whether such loss or damage arises in contract, negligence, tort, under statute, or otherwise. © 2021 Chartered Accountants Australia and New Zealand ABN 50 084 642 571. MCT-15844_May21



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