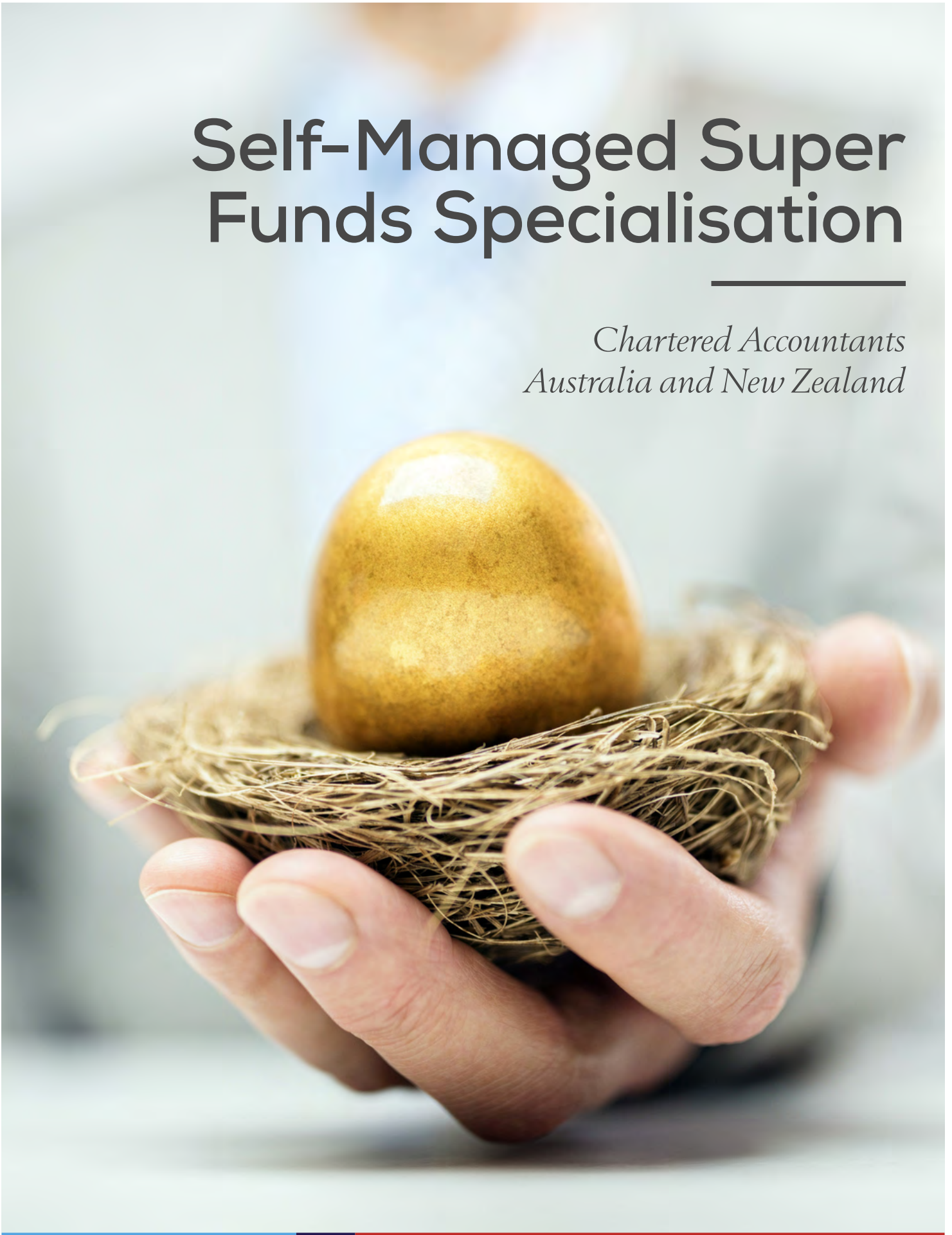


# Self-Managed Super Funds Specialisation

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*Chartered Accountants  
Australia and New Zealand*



# Self-Managed Super Funds Specialisation

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*Take the first step to gain formal recognition of your expertise as a CA SMSF Specialist. Offered through flexible 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.

## Two pathways to your Self-Managed Super Funds Specialisation

You can complete the program through postgraduate study if you have worked in Self-Managed Super Funds for at least two of the past five years (Emerging Pathway).

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

Both pathways are facilitated by Kaplan Professional.

### Key dates

#### Emerging Pathway

There are six intakes each year, which are detailed on the Kaplan Professional website.

#### Experienced Pathway

There are two intakes per year.

#### 2021 Intake 1

Enrolment period	Monday 8 February 2021 – Wednesday 24 March 2021
Online study commencement	Monday 8 March 2021 – Friday 28 May 2021
Assignment	Monday 12 April 2021
Exam	Monday 24 May 2021

#### 2021 Intake 2

Enrolments period	Monday 2 August 2021 – Wednesday 15 September 2021
Online study commencement	Monday 30 August 2021 – Friday 19 November 2021
Assignment	Monday 4 October 2021
Exam	Monday 15 November 2021

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



## Entry requirements and pathway details

### EMERGING PATHWAY

Postgraduate study

#### Eligibility

Members who have worked in the area of Self-Managed Super Funds for at least two of the past five years.

During this period, at least 40% of your role must have been related to Self-Managed Super Funds.

#### Course framework

Undertake the Graduate Certificate in Self-Managed Superannuation Funds, which must include the following four subjects:

- SMS001 SMSF Best Practice
- SMS002 Understanding SMSF Trustees
- SMS003 SMSF Strategic Advice
- SMS005 SIS Regulation and Taxation

#### Workload and CPD hours

The program should be completed in eight months full time or fifteen months part time. There's also an accelerated option which can be completed in six months.

Members may claim up to 30 hours as formal CPD per subject, in accordance with the requirements of regulation CR7.

#### Delivery method

Online

#### Course fees

Four mandatory Kaplan subjects	\$2,500 per subject
<b>Total course fee – four subjects</b>	<b>\$10,000</b>

#### 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
<b>Total member fee for program and application</b>	<b>\$10,232</b> incl. GST
<b>Ongoing annual specialisation subscription fee</b>	<b>\$280</b> 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 CPD requirement must be undertaken in superannuation.

## EXPERIENCED PATHWAY

Online course and practical experience

### Eligibility

Members who have worked in Self-Managed Super Funds for at least four of the past ten years.

During this period, at least 40% of your role must have been related to Self-Managed Super Funds.

### Course framework

The online course is offered through Kaplan Professional and is delivered over twelve weeks.

It involves completing the SMS005 SIS Regulation and Taxation subject from the Graduate Certificate in SMSF, which covers the following areas:

- SMSF regulatory framework
- Regulating SMSFs
- Contribution standards
- Investing in an SMSF
- Taxing an SMSF
- Correlation, covariance and causation
- Members' interest and preservation standards
- Payment standards and paying a benefit
- Superannuation tax standards
- SMSF controls – planning for life events

### Workload and CPD hours

The Kaplan online course is self-paced over 12 weeks, with an assessment in week 6 and exam in week 12.

Members may claim 30 hours as formal CPD, in accordance with the requirements of regulation CR7.

On successful completion of SMS005 SIS Regulation and Taxation, advisers are eligible for 30 CPD hours under the FASEA CPD Standard.

### Delivery method

Online

### Course fees

Kaplan online course fee **\$2,100**

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** \$2,332 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://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](https://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://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 February 2021 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](https://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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