

WHY USE HEFFRON'S IN-HOUSE SMSF TRAINING SERVICE?

In the competitive world of financial services, it is paramount that your staff can proactively identify innovative but practical solutions for your clients. Heffron has a national reputation for helping other professionals to find such solutions via our in-house training service (ie training delivered on your premises).

Our training draws upon the extensive superannuation and SMSF experience of the firm's technical team (including Meg Heffron and Leigh Mansell), which allows you to tap into their expertise and empower your staff to add value to your SMSF client relationships.

We provide you with the flexibility to structure a program suitable for your needs as follows:

- We are able to provide training at a range of levels – we have modules suitable for your new staff with no superannuation expertise ranging up to modules which are pitched at an advanced level for the SMSF specialists in your firm;
- We can tailor a session for you with either a compliance focus (ie focus on the “rules”) or strategic advice focus (ie focus on strategies for client facing staff);
- Each in-house session is generally 2 hours long (but can be longer if you require) with ample time for Q & A specific to your clients;
- We generally suggest a maximum of 20 attendees per session to allow for interaction within the group;
- For most sessions, there is both a presentation and workshop element to make sure that the practical implications are reinforced for your staff. Where appropriate to the topic we include a range of practical materials such as flow charts and guides; and
- Attendees can use their participation in the sessions to meet their ongoing CPE requirements for superannuation and (more particularly) SMSFs.

We charge a fixed dollar fee for each individual training session and we discount this fee where you commit to 2 or more in-house sessions each year.

If you are looking for a valuable training solution for your staff, which will not only add value to your SMSF client relationships but also enhance your staff's personal development, please call Heffron on 1300 172 247 or go to www.heffron.com.au.