

Super Intensive Day 2024 – Virtual Event Agenda

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*Agenda is subject to change

Time	Stream A	Stream B
9am to 9:05am	Welcome	
9:05am to 10:05am	Plenary 1: Division 296 strategy update Division 296 is probably the most controversial super tax proposed in years. Let us help you understand how it will impact your clients, steps they should and shouldn't consider, what's urgent and what's not. Our modelling provides the most comprehensive analysis we've seen to date and we can't wait to share our latest insights with you. SPEAKER: Meg Heffron	
10:05am to 10:25am	20 min morning tea break	
10:25am to 11:25am	Plenary 2: Contribution strategies For most clients super remains a tax effective vehicle for saving for retirement. We'll make sure your clients don't miss any strategy opportunities including those that don't see the light of day often enough. SPEAKER: Lyn Formica	
11:25am to 11:35am	10 min break	
11:35am to 12:35pm	Plenary 3: It's time to start taking out lumpy benefits...what should I have thought about? Make sure you're fully prepared! In this session, we'll explore the crucial considerations for paying out benefits—whether a fund is winding up, paying death benefits, reducing super balances, or “just because”. We'll delve into the specifics of paying in-specie benefits, including whether you can directly transfer assets to a third party and how to ensure your documentation is right. We'll also cover strategies for maximising exempt current pension income, focusing on the optimal timing of benefits and important considerations when transferring ownership of fund assets. SPEAKER: Annie Dawson	
12:35pm to 1:05pm	30 min lunch break	
1:05pm to 2:15pm	Concurrent 4A: Death benefits – from a beneficiary's perspective We usually think about death benefit planning from the perspective of the member. In this session we switch it around – what if plans previously put in place by the member don't suit the needs or circumstances of their beneficiaries at the time of death? What aspects of a beneficiary's circumstances could the member consider to prevent issues for them later on? What can beneficiaries do after the member's death to alter arrangements to better suit their needs? SPEAKER: Leigh Mansell	Concurrent 4B: You suspect a NALI/NALE problem – now what? Unlike SIS contraventions, dealing with NALI/NALE problems isn't as simple as making a voluntary disclosure to the ATO. In this session, we'll work through the latest guidance and how to respond to NALI/NALE problems under the different client scenarios we've seen in practice. SPEAKER: Lyn Formica
2:15pm to 2:25pm	10 min break	
2:25pm to 3:25pm	Concurrent 5A: Division 296 – how it works Let us run you through the mechanics of how the proposed new tax will work for your clients. We explain how the important amounts will be calculated, adjustments for those who fall below \$3m (or exceed it for the first time), the ins and outs of carrying forward losses and what the changes to total super balance will mean for all your clients, not just those likely to be impacted by Division 296. SPEAKER: Meg Heffron	Concurrent 5B: Weird (and wonderful?) investments SMSFs are investing in an ever increasing range of asset types with new ones constantly and rapidly emerging. Through the use of case studies, we'll help you develop a step-by-step process to use when you encounter a “weird” or unfamiliar asset. Is it an asset that an SMSF can acquire? And if so, should it? SPEAKER: Leigh Mansell
3:25pm to 3:40pm	15 min afternoon tea break	
3:40pm to 3:50pm	Plenary 6 – Heffron update SPEAKER: Meg Heffron	
3:50pm to 4:50pm	Plenary 7 – In the trenches Our technical support desk and our work administering over 5,000 SMSFs gives us great insight into the SMSF challenges you face in your practice. We'll finish this year's Super Intensive Day by sharing some of the ways we've overcome those challenges - what worked, what didn't, what's still a work in progress. PANEL: Lyn Formica and Annie Dawson	
4:50pm to 5pm	Wrap, close and prize draw	

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