

NTAA's Super Basics 2019 Online Seminar



**NEW
NTAA ONLINE
SEMINAR – 6.5
CPD Hours**

A Comprehensive Guide to the Fundamentals of Superannuation and SMSFs – Everything you NEED to Know!

In this seminar, we examine the fundamentals of superannuation and SMSFs, including all the key compliance and tax issues that are relevant to running an SMSF and preparing a fund's annual tax return.

A Practical Guide to Setting up an SMSF

- ◆ Step-by-step guide to setting up an SMSF
- ◆ How to comply with the trustee-member rules
- ◆ Who should be the trustee(s) of the fund?
- ◆ Dealing with SMSF formation costs

Dealing with the Superannuation Contribution Rules

- ◆ What is a contribution and the different ways that a contribution can be made to an SMSF
- ◆ Dealing with employer contributions, including the deductibility rules
- ◆ Dealing with personal (or member) contributions, including the deductibility rules
- ◆ Applying the contribution capping rules, including the rules for dealing with excess contributions

The 'Nuts and Bolts' of how to Comply with the Investment Restrictions for SMSFs

- ◆ A practical guide to the sole purpose test
- ◆ The prohibition on acquiring assets from related parties
- ◆ The in-house asset rules (including investments in related trusts and non-g geared entities)
- ◆ The restrictions for SMSFs investing in collectables and personal use assets (e.g., artwork)
- ◆ Complying with the borrowing rules for SMSFs

How to Correctly Deal with an SMSF's Income and Expenses

- ◆ The tax treatment of SMSF income for funds in accumulation and pension phase
- ◆ Dealing with the deductibility rules for SMSF expenses
- ◆ Allocating SMSF investment earnings and expenses to member accounts

A Practical Guide to Paying Lump Sum and Pension Benefits to Members

- ◆ Identifying when an SMSF can pay lump sum and pension benefits
- ◆ Key obligations for SMSF trustees when paying lump sum and pension benefits to members
- ◆ Applying the pension standards for SMSFs paying pensions
- ◆ Key obligations for SMSF trustees when paying death benefits

An A to Z guide to completing the SMSF annual tax return

- ◆ How to correctly complete key and danger labels on the SMSF annual return
- ◆ Completing the SMSF return for funds that are in accumulation phase and funds in pension phase
- ◆ A practical guide to correctly reporting information on the SMSF return



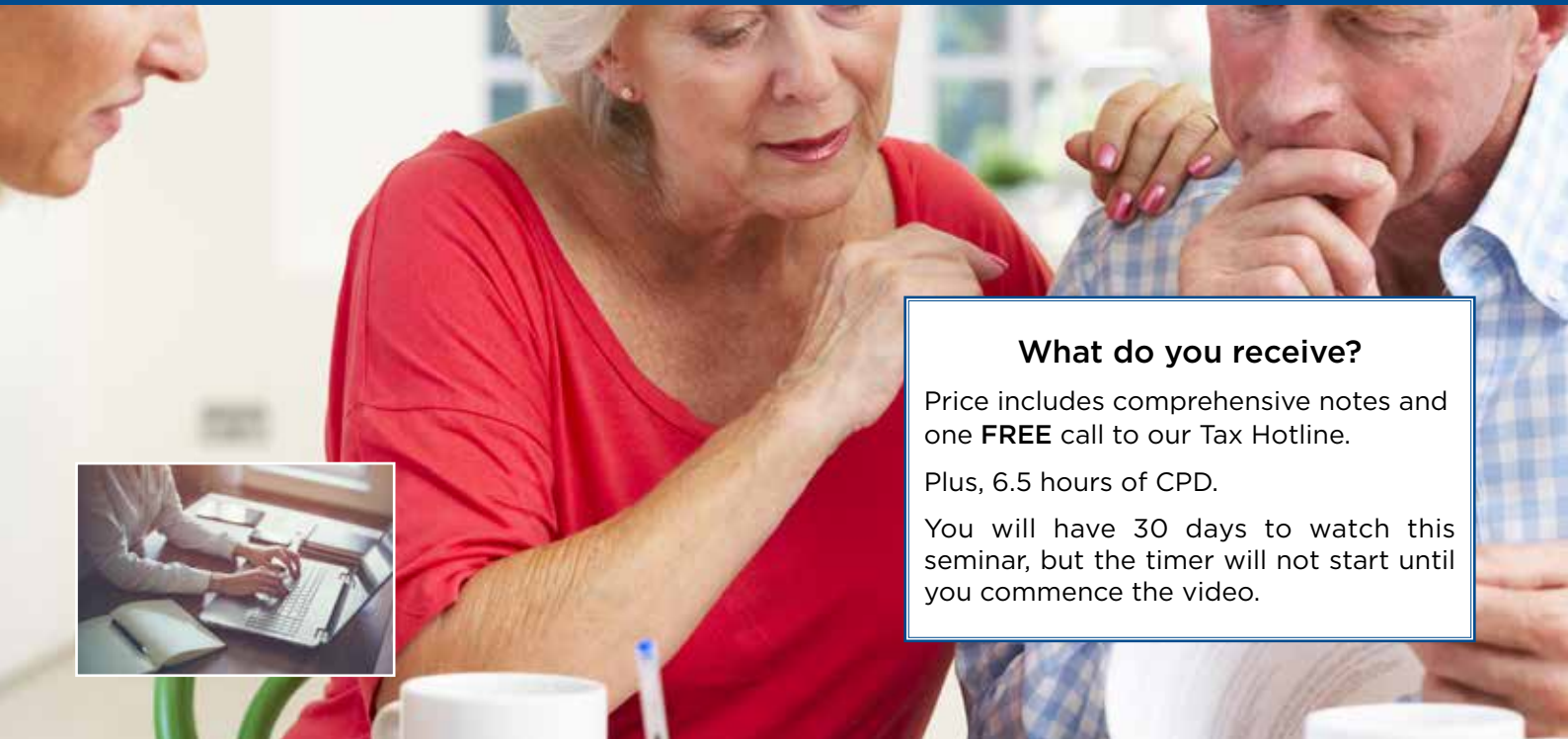
National Tax & Accountants' Association Ltd.
29-33 Palmerston Cres, South Melbourne, Vic. 3205
Tel: 1800 808 105 Fax: 1300 306 351

Web: ntaa.com.au Email: ntaainfo@ntaa.com.au ABN: 76 057 551 854

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NTAA's Online Super Basics Seminar



What do you receive?

Price includes comprehensive notes and one **FREE** call to our Tax Hotline.

Plus, 6.5 hours of CPD.

You will have 30 days to watch this seminar, but the timer will not start until you commence the video.

NTAA's Online Super Basics Seminar Cost

Members

- \$ 359 (incl. GST) - Includes PDF and hard copy of the notes
- \$ 339 (incl. GST) - PDF copy of the notes only

Non-Members

- \$ 459 (incl. GST) - Includes PDF and hard copy of the notes
- \$ 439 (incl. GST) - PDF copy of the notes only

Online Duration: 6.5 Hours

NTAA's Online Super Basics Seminar Registration

This document will be a tax invoice for GST when fully completed and you make payment to the National Tax & Accountants' Association Ltd.
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Tel: 1800 808 105 Fax: 1300 306 351

Web: ntaa.com.au Email: ntainfo@ntaa.com.au ABN: 76 057 551 854

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