



# *SMSF Trustee Strategy Day for Charity*

A joint initiative of The SMSF Review, Alan Kohler's Eureka Report, and Rogermontgomery.com

***Learn from the best in the business, while helping those in need!***

Join us for a day of self managed superannuation learning par excellence, where you will have the opportunity to learn and interact with some of the country's most respected self managed super and investment experts, including Alan Kohler, Roger Montgomery, Jeremy Cooper, Meg Heffron and many more...

**100% of the net proceeds of this event will go to where its needed most** – to those badly affected by the recent natural disasters. None of us will be earning one red cent out of it – its all for charity.

***So come along and support a great cause, while learning the strategy secrets that can take your SMSF to a whole new level!***

**Tuesday 15th March 2011  
8.30am to 4.00pm**

**Doltone House**

Jones Bay Wharf, 19-21 Upper Deck,  
26-32 Pirrama Road, Pyrmont Point, Sydney, NSW

**\$77** (incl. GST)

Book online now at  
[thesmsfreview.com.au/events.html](http://thesmsfreview.com.au/events.html)



# The speakers

## ***Alan Kohler***

Alan is the former editor of The Australian Financial Review and The Age, former business editor of ABC TV's 7.30 Report, former Chanticleer columnist for The Australian Financial Review and a former columnist for The Age and the Sydney Morning Herald. He is currently finance presenter on ABC Television News, host of Inside Business on ABC TV, publisher and founder of Eureka Report and Business Spectator.

## ***Stuart Forsyth***

Stuart is the Assistant Commissioner (Superannuation) at the ATO, which involves leadership of the SMSF Segment within the Superannuation Business Line. In this role and his previous role as centre manager, he had extensive involvement in the Superannuation Simplification measures. Stuart is currently heavily involved in the SMSF areas of the Stronger Super project which has been set up to implement the Cooper Report recommendations.

## ***Jeremy Cooper***

Jeremy was the chairperson of the Government's recent review into the superannuation system, also known as the 'Cooper Review'. He was formerly the Deputy Chairman of ASIC, where he had oversight responsibility across a range of ASIC's teams. He currently is the chairman of retirement income at Challenger.

## ***Roger Montgomery***

Roger is one of the nation's most successful and well known 'value investors'. He founded the boutique investment management office Montgomery Investment Management in 2011 following a successful career as a fund manager, public company Chairman and most recently, best-selling author of Value.able, a step-by-step guide to valuing the best stocks and buying them for less than they're worth.

## ***Meg Heffron***

Meg is the principal of Heffron, a specialist SMSF administration and services company, and is one of Australia's most highly regarded SMSF technicians and presenters. This view was reinforced when she was appointed as the SMSF industry panel member of the Government's Super System review (also known as the Cooper review), chaired by Jeremy Cooper.

## ***Jonathan Pain***

Jonathan is the author and publisher of investment newsletter, The Pain Report. His 25 years of experience includes Chief Investment Strategist of HFA asset management, Chief Investment Officer of Rothschild Australia Asset Management, Head of Investments at Gulf International Bank in Bahrain and Chair of the International Asset Allocation Committee at Paribas Asset Management in London.

## ***Philip La Greca***

Philip is the Technical Services Director for Multiport, and has been in the superannuation industry since 1980. Philip was a founding member of the Australian Retirement Income Streams Association (ARISA) Technical Committee that had been involved in assisting the Government with issues related to Retirement Income Streams, and is on the technical committee for SISFA.

## ***David Busoli***

David is a SMSF technical specialist with Cavendish Superannuation, and a veteran of the SMSF administration sector. He spends a lot of time educating professional financial service providers including financial planners, accountants, lawyers and stock brokers operating in the self managed super sector, and was a founding member of the SMSF professionals association.

## ***Denis Barlin***

Denis Barlin is a director of SBN Lawyers, and specialises in commercial law, taxation, and superannuation. Denis was heavily involved with the 'gearing of superannuation fund' process from before the introduction of subsection 67(4A) of the SIS Act. Denis has been a regular speaker for professional associations such as the Taxation Institute of Australia.

# The agenda / morning

---

8.30 – 9.15 Registrations

---

9.15 – 9.20 Welcome

---

9.20 – 10.00 Keynote speech - The ATO and You

In this informative session that is simply not to be missed, Stuart will outline the ATO's approach to working with SMSF trustees, the key issues they are currently focusing on, and their view on current hot topics. Hear it straight from the man at the very top - every trustee needs to hear this!

*Stuart Forsyth - Assistant Commissioner (Superannuation), ATO*

---

10.00 – 10.30 My top SMSF pension strategies

Commencing an income stream on retirement is one of the most significant milestones in the lifecycle of a SMSF. In this session, Meg will take you through her favorite strategies for extracting the most benefit from them, while avoiding the pitfalls.

*Meg Heffron – Principal, Heffron, and panel member of the recent Super System Review*

---

10.30 – 11.10 Mastering Value Investing in a SMSF

Australia's master of value investing shows you step by step how to successfully invest in the stock market in the most rational, logical way by identifying extraordinary businesses and buying them for less than they're worth. He'll also show you real world examples of businesses to avoid, and also where the current bargains are.

*Roger Montgomery – Analyst, Montgomery Investment Management & author of Value.able*

---

11.10 – 11.30 Morning tea break

Morning tea will be supplied by the venue.

---

11.30 – 12.00 Where are the current investment opportunities for SMSFs

In this session Alan Kohler, one of Australia's most well known financial commentators, presents his analysis of the current investment themes and opportunities that SMSF investors should be looking at, along with insights gained from his daily interaction with the leaders of Australian business.

*Alan Kohler – founder Business Spectator, Eureka report, and finance presenter for the ABC*

---

12.00 – 12.30 Panel Discussion – debating SMSF investment strategies

Alan Kohler chairs a panel discussion of experts debating various issues such as the pros and cons of popular SMSF investment strategies, and how they invest in their own SMSF. Alan will also talk to Jeremy Cooper about his findings from chairing the recent Super System review with regard to SMSFs.

*Alan Kohler – Business Spectator, Eureka Report, the ABC.*

*Roger Montgomery – Montgomery Investment Management, author of Value.able*

*Jonathon Pain – The Pain Report*

*Jeremy Cooper – Chairman, Super System Review, Challenger Retirement Incomes*

---

# The agenda / afternoon

---

12.30 – 1.30 Lunch

Lunch is at your own arrangements. Cafes are located downstairs to the venue.

---

1.30 – 2.00 The New Reality

Jonathan believes that the world is increasingly divided between those nations that are submerging and those that are emerging. Where does Australia sit in this 'Great Divide'? Jonathan will take you on a tour of the world moving from West to East, via the Middle East, in an attempt to see where we are all heading in the years and decades to come.

*Jonathan Pain – The Pain Report*

---

2.00 – 2.30 My top SMSF Contribution Strategies

Superannuation is a wonderful tax advantaged environment, however a key problem for many people these days is getting enough money into the system due to the reduction in the contribution caps. In this session, Philip will take you through the popular SMSF contribution strategies and what you need to watch out for so that you don't incur penalties or excess tax.

*Philip La Greca – Technical committee, SISFA, & technical director, Multiport*

---

2.30 – 2.50 Afternoon Tea Break

Afternoon tea will be supplied by the venue

---

2.50 – 3.20 Borrowing to invest in property in a SMSF

This is a hot topic right now, but fraught with traps. David will take you through a step by step process on exactly how to borrow to invest in property in a SMSF, and fill you in on the myriad of real world issues you need to be aware of when putting it into practice, including the traps to avoid along the way.

*David Busoli – Cavendish Superannuation*

---

3.20 – 3.50 Estate Planning strategies

Estate Planning is one of the most important aspects of your SMSF, but can be a nightmare if you get it wrong. In this session, Denis will take you through the key concepts you need to get your head around, the pitfalls to avoid, and will step you through the options you have in terms of how your SMSF assets can be passed on in the most tax effective manner.

*Denis Barlin – SBN Lawyers*

---

3.50 – 4.00 Closing address

---

# The venue

## Directions to Doltone House

There are many ways that you can get to Doltone House Jones Bay Wharf. You can get there by foot or by taking the Metro Light Rail from Central Railway Station or the Monorail from Darling Harbour via the city. There is a government bus service that departs from Circular Quay; this is the 443 and 449 service.

### Walking Distance

Minutes walk from Darling Harbour and Sydney Convention Centre.

### Buses – State Transit

The state transit bus route 443 and 449 regularly departs Circular Quay to Jones Bay Wharf. for route and timetable information call 13 15 00 or visit [www.sta.nsw.gov.au/timetable](http://www.sta.nsw.gov.au/timetable).

### Metro Light Rail

Departs from central station via darling harbour to star city every 7 to 10 minutes and operates seven days a week. Park at the entertainment centre or harbourside car parks and catch the light rail to star city. For further information call (02) 9552 2288 or visit [www.metromonorail.com.au](http://www.metromonorail.com.au).

### Monorail

The Sydney monorail links Sydney city, darling harbour and Chinatown. It operates every two to three minutes, seven days a week. for further information call (02) 8584 5288 or visit [www.metromonorail.com.au](http://www.metromonorail.com.au)

### Water Taxi

For further information call water taxis combined on 1300 666 484.

### Ferry Service

Operates seven days a week from Circular Quay and stops at Pyrmont Bay. For route and timetable. Information on state transit's Darling Harbour ferry to Pyrmont Bay Wharf call 13 15 00 or visit [www.sydneyferries.info/timetables/darlingharbour.php](http://www.sydneyferries.info/timetables/darlingharbour.php).

### Parking

Promonotory wilson parking – Pirrama Road Pyrmont (opposite Doltone House). Phone: (02) 9552 2330.

Star City Casino parking station – Pyrmont Street, Pyrmont. Phone: (02) 9777 9000.

