

Estate Planning & your SMSF: Strategies and Case Studies

Presented by the Australian Capital Territory State Chapter

Wednesday, 28 April 2010

Canberra Rex Hotel

150 Northbourne Avenue, Braddon

3.00pm—6.00 pm

3.00pm - State Chapter Meeting | 3.30pm - Presentation | 5.00pm - Networking & drinks

Session Outline

Highly regarded speaker, Michael Fitzpatrick will cover 7 key issues to address with your SMSF:-

- How to pass control on death & incapacity
- Best way to pay death benefits & trust deed amendments
- Most appropriate form of binding nominations
- Super death benefit tax strategies
- Asset protection for death benefit beneficiaries
- Other documents such as Will, POAs
- Trust deed compliance with Will, POA

Registrants are encouraged to forward topical case studies to SPAA before the event, for group discussion with Michael.

"Fantastic presentation. Highlight of the conference. Technically superb! As importantly, an engaging presentation."

2010 SPAA National Conference Delegate

Presenter Profile



Michael Fitzpatrick (founder and principal of Clarendene Estate Planning Lawyers) heads a highly specialised team of lawyers providing sophisticated estate planning services to clients of PricewaterhouseCoopers and other accounting and financial services firms right around Australia.

Michael's 33 years of legal practice and 20 years of involvement in financial planning have provided him with broad financial and estate planning experience. He practices extensively in the areas of estate planning, testamentary trusts, wills, advice on the use of appropriate tax structures for asset protection and business ventures, and SMSFs.

Registration

Cost:

Members: \$30.00 Non-Members: \$40.00

Complete the Registration Form and return to the SPAA Office via email events@spaa.asn.au or fax to (08) 8212 5993.

For further information contact Janelle Webber on (08) 8212 5999.

Registration Form / Tax Invoice

SMSF Professionals' Association of Australia Ltd ABN 67 103 739 617

Please photocopy for additional registrations. All prices quoted include GST.

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Registration:

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