

# Helping you shape your professional future



## Membership



SELF-MANAGED SUPER FUND  
PROFESSIONALS' ASSOCIATION  
OF AUSTRALIA





## We invite you to join us!

Becoming a SPAA member means you'll experience the many benefits of being part of Australia's peak association for the SMSF sector.

We are building a great profession by helping to build great professionals.

As a member you will become part of a dynamic and proactive association of industry practitioners who together are growing the sector with integrity. We are setting high standards and endorsing even higher levels of education and skills in SMSF advice.

SPAA's Specialist Accreditation brands are increasingly being sought by consumers who want SMSF expertise from recognised professionals. As a General Member you can start on your pathway to becoming an accredited SMSF Specialist Advisor™ or SMSF Specialist Auditor™ straight away. As an Accredited Specialist, you can use the designations in the promotion of your professional practice.

As our industry continues to grow, there is no better time to join a like-minded community of SMSF professionals. Contact us at SPAA and see how we can help shape your professional future!

**Andrea Slattery**  
SPAA CEO

## About SPAA

The SMSF Professionals' Association of Australia (SPAA) is the peak professional body for SMSF advisors in Australia.

We aim to raise the standard of advice provided by all professionals to the SMSF sector and actively promote the highest levels of education amongst SMSF professionals.

SPAA members are recognised as specialists in the Australian marketplace, and accredited members are the SMSF advisors of choice for consumers.

## Benefits of Membership

Membership of SPAA has been growing rapidly, with members in 2009 expected to exceed 2000. Strong growth in the SMSF sector means there has never been a more opportune time for you to join SPAA, to increase your skill base and to become a recognised SMSF professional.

Membership benefits include:

### Accreditation

As the peak industry body for SMSF professionals in Australia, SPAA members can become accredited as specialists in their field. Specialist Members can use the SMSF Specialist Advisor™ or SMSF Specialist Auditor™ designation in their professional promotion as a point of difference in this competitive and growing sector. You will also be listed at SPAA's Find an SMSF Specialist Advisor web site.

### Education

SPAA's core focus is to promote high standards of education to our members. We provide you with access to SPAA independently accredited specialist education courses to ensure your continued growth and learning in this highly specialised field.

### Government & Regulatory Advocacy

SPAA has and will continue to build strong relationships with government bodies and like-minded professional associations in the interests of providing positive outcomes for members and the SMSF sector.

### Networking

Networking opportunities as a SPAA member are significant and will assist in the growth and development of your business. Special interest groups plus national, regional and local discussion groups allow members to consider aspects of the SMSF sector and your own businesses with a view to building strong, lasting alliances.

### State Chapters

SPAA has established State Chapters that disseminate information locally to members. State Chapters provide a personal forum for discussion, information sharing and networking between members. Sector leaders, government representatives and other guest speakers regularly attend State Chapter gatherings to ensure a flow of relevant and timely information.

### Online Member Services

The SPAA website [www.spaa.asn.au](http://www.spaa.asn.au) provides a constant and up to date link between SPAA and members.

Restricted member-only information includes:

- monthly member newsletter
- legislative and regulatory updates
- member forum
- resource library
- SPAA events calendar

### Events

As a SPAA member, you are regularly invited to attend key information seminars and conferences held by SPAA. Members are also sought as guest speakers. The information provided at these events significantly enhances the quality of advice and service advisors are able to provide to their clients.

## How to Become a Member

### General Membership

General Membership enables unlimited access to the SPAA website, chapter participation and educational opportunities, along with standard member benefits including preferential rates for SPAA events.

To become a SPAA General Member, you must be currently practising as a SMSF professional with a minimum of two years experience in the SMSF sector. Individuals who have an undergraduate degree or equivalent are eligible to apply for membership. If you provide advice under a financial services licensing arrangement, you must have completed a RG146/PS146 requirement for superannuation and SMSF. General Membership is available to individuals only, corporate or discounted company memberships are not available.

This category does not allow members voting or branding rights.

SPAA encourages all General Members to make an application to achieve SPAA Specialist Accreditation within the first 18 months of joining SPAA, but those who wish to maintain their association through General Membership are also welcome.

General Membership cost \$660 p.a. (inc.GST)

More information can be found at [www.spaa.asn.au](http://www.spaa.asn.au)

### Specialist Membership

Only General Members of SPAA are eligible to apply for Specialist Membership.

General Members may apply for the following Specialist Memberships:

- SMSF Specialist Advisor™ (SSA™)
- SMSF Specialist Auditor™ (SSAud®)

To apply for Specialist Membership, General Members are required to successfully complete the SPAA Accreditation Program. Acceptance into this membership category requires the candidate to successfully pass the Examination and Professional History and Experience components and undergo a formal review by the SPAA Accreditation Council.

Specialist Members will receive all the branding rights for the SPAA SMSF Specialist Advisor™ designation and unlimited website access, chapter participation and educational opportunities, along with standard member benefits including preferential rates for SPAA events to the SPAA website.

Specialist Membership cost \$660 p.a. (inc.GST)

## Contact us

### National Office

SPAA  
Level 1, 366 King William Street  
Adelaide, South Australia 5000

**T** 08 8212 5999

**F** 08 8212 5993

**E** [enquiries@spaa.asn.au](mailto:enquiries@spaa.asn.au)

**W** [www.spaa.asn.au](http://www.spaa.asn.au)

### Postal Address

PO Box 6540, Halifax Street  
Adelaide, South Australia 5000

# General Member Application Form

## applicant details

Dr     Mr     Mrs     Ms     Miss    Other: .....

First name(s)     Middle name(s)   
 Surname     Date of birth

## contact details

Company Name     Preferred address for SPAA correspondence:  
 Work     Work Postal     Home

Position Title   
 ABN/ACN     Authorised Representative No. (if applicable)   
 Dealers Group (if applicable)     Dealers Group No. (if applicable)   
 Company Street Address   
 Suburb     State     Postcode   
 Company Postal Address   
 Suburb     State     Postcode   
 Telephone (work)     Facsimile   
 Mobile     Email (work)   
 Company website   
 Home Address   
 Suburb     State     Postcode   
 Telephone (home)     Email (home)

## payment details

**Subscription fees**  
**Individual:** \$660.00 p.a. (incl GST). Annual membership 1 April – 31 March.  
 Please contact SPAA for current pro-rata rates  
**Please send your completed application form and payment to:**  
 SPAA PO Box 6540, Halifax St, Adelaide SA 5000.  
 Amount payable (inc GST): \$660.00 Valid until 31 March 2011  
**Direct deposit:**                      Westpac    BSB 033-113    A/c No 191756  
**Cheque / money order:**            Made payable to: SPAA  
**Credit Card :**                           Visa             MasterCard  
 Credit Card no.                  
 Expiry Date   /    
 Cardholder's Name (please print)     Date   
 Signature   
 Please tick if you do not wish your contact details to be published on the SPAA website.

## your professional profile

Please indicate your primary & secondary (if applicable) occupation by placing a 1 and 2 next to appropriate occupation.

<input type="checkbox"/> Accountant/Tax Agent	<input type="checkbox"/> Estate Planner
<input type="checkbox"/> Accountant/Financial Planner	<input type="checkbox"/> Financial Planner
<input type="checkbox"/> Actuary	<input type="checkbox"/> Investment Advisor
<input type="checkbox"/> Administrator	<input type="checkbox"/> Journalist
<input type="checkbox"/> Auditor	<input type="checkbox"/> Lawyer
<input type="checkbox"/> Corporate Management	<input type="checkbox"/> Risk Advisor
<input type="checkbox"/> Editor	<input type="checkbox"/> SMSF Professional
<input type="checkbox"/> Educator	<input type="checkbox"/> Other (please specify) .....

## education qualifications

HSC or Matriculation     PS146 / RG146  
 Please list your Educational Qualifications below

Level e.g. Diploma, Bachelor, Masters	Area e.g. Accounting, Business, Commerce	Country

Registered Company Auditor?  Yes     No

Please list your Membership & accreditations below

Association e.g. CPA, FPA, NIA, ICAA, TIA, MTAA	Member Type e.g. Member, Fellow, Associate	Designation e.g. CPA, CFP, CA, PNA	Professional Certificate Please tick
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Year you began working with SMSFs? .....  
 What proportion of your work is SMSF related? ..... %

## survey

What are your main reason(s) for joining SPAA?

<input type="checkbox"/> Accreditation	<input type="checkbox"/> SMSF Education
<input type="checkbox"/> Networking	<input type="checkbox"/> SPAA Event
<input type="checkbox"/> Legislative Advocacy	<input type="checkbox"/> Professional Development
<input type="checkbox"/> Technical Information	<input type="checkbox"/> Other (please specify) .....
<input type="checkbox"/> Regulatory Updates	

How did you hear about SPAA?

<input type="checkbox"/> SPAA Member	<input type="checkbox"/> SPAA Advertising
<input type="checkbox"/> SPAA Staff / Board	<input type="checkbox"/> SPAA Event
<input type="checkbox"/> Word of mouth	<input type="checkbox"/> In the media
<input type="checkbox"/> Internet	<input type="checkbox"/> Other (please specify) .....

I would like to join the following State Chapter networks:

<input type="checkbox"/> ACT	<input type="checkbox"/> SA	<input type="checkbox"/> WA
<input type="checkbox"/> VIC	<input type="checkbox"/> NSW	<input type="checkbox"/> QLD
<input type="checkbox"/> Bendigo	<input type="checkbox"/> Hunter Region	<input type="checkbox"/> Gold Coast
	<input type="checkbox"/> North Shore	<input type="checkbox"/> Sunshine Coast
		<input type="checkbox"/> Rockhampton

## declaration Individual member declaration

I hereby apply to become a member of the SMSF Professionals' Association of Australia Ltd (SPAA). I agree to disclose any further relevant information required by SPAA and declare all information supplied in this application is correct and true. Once admitted to membership, I agree to pay all membership fees within 7 days of notification. I understand that my membership may cease if the fees are not received by the due date. I agree to abide by the Constitution of the SMSF Professionals' Association of Australia Ltd. I agree not to use, or in any way hold out to be a Specialist SPAA member, until obtaining Specialist Member accreditation.

Applicant's Signature     Date