

# Borrowing through Super to invest in Property

Presented by the NSW Hunter Region Sub-Chapter

Thursday, 3 June 2010

Cutcher & Neale—25 Bolton Street, Newcastle

8.30am—10.00am

(Registration from 8.15am—coffee and biscuits to be served)

## Outline

Guest speaker, Craig Morgan, Managing Director of I-Financial Group Pty Ltd will cover the following in his session:

- Brief background of SMSF lending and structures
- Current approach by lenders
- Available lending arrangements and parameters
- Review of Personal Guarantees
- Review of Related Party loans
- Suggestions on when to/not use SMSF borrowing
- Suggested sequencing for these transactions

## Presenter Profile



**Craig Morgan** is a thought leader in the area of leveraging SMSF investment strategies. He is regularly called upon by Accounting, Advice, Property, and Finance Groups to present on the subject of lending to SMSF's.

The legislation governing this area is technical and, at first glance, daunting. Craig sees one of his key responsibilities as bringing 'clarity to confusion' and assisting SMSF Trustees, and their Professional Advisers alike, with a better understanding of how to establish compliant and empowering transactions.

Craig is passionate about educating clients on the opportunity to unlock the power of their Superannuation funds and take control of their own financial future.



## Registration

### Cost:

Members: \$15.00      Non-Members: \$20.00

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

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

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## 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.

### Send your registration and payment by:



**Email** Simply scan and send your completed registration to:  
[events@spaa.asn.au](mailto:events@spaa.asn.au)



**Mail or Fax** your completed registration and forward by mail or fax with your payment to the address or number below.  
Address: SPAA, PO Box 6540, Halifax Street ADELAIDE SA 5000  
Fax: (08) 8212 5993

### Registration:

- Member (\$15.00)       Non-Member (\$20.00)

### Registrant Contact Details:

- Mr    Mrs    Ms    Miss    Dr

Given Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Member No: \_\_\_\_\_

Postal Address: \_\_\_\_\_

Suburb: \_\_\_\_\_

State: \_\_\_\_\_

Postcode: \_\_\_\_\_

- I am a SPAA SMSF Specialist Advisor™

Company: \_\_\_\_\_

Title: \_\_\_\_\_

Tel: \_\_\_\_\_

Mobile: \_\_\_\_\_

Email: \_\_\_\_\_

Fax: \_\_\_\_\_

Dietary Requirements: \_\_\_\_\_

- I am a SPAA SMSF Specialist Auditor™

### Payment Method

- I enclose a **cheque**\* for \$ \_\_\_\_\_

\* Please make cheque payable to SPAA.

- Please charge my **credit card** \$ \_\_\_\_\_

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- I will **electronically transfer** \$ \_\_\_\_\_ into the account below.

Westpac Bank **BSB:** 033-113 **Account No:** 191756

**IMPORTANT:** Please be sure to include your surname in the description for identification purposes.

Card No:                    /                    /                    /

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