

SMSF Instalment Warrants: What works & what doesn't from a panel of experts

Presented by the NSW Central Coast State Sub-Chapter

Tuesday, 20 July 2010

Gosford Golf Club, Magnolia Room—Racecourse Road, West Gosford

5.00pm—7.30pm (*Networking and Nibbles from 5.00pm*)

Outline

SMSF Gearing—how, what and why?

- Investment rationale for gearing
- Key gearing strategies for SMSF
- What does APRA say about gearing in SMSFs
- What are the main types of SMSF gearing available?
- Cooper Phase 3
- What REALLY happens behind the scenes in SMSF gearing (e.g. key structural issues)
- SIS Act—current provisions and proposed reforms
- What's all the fuss?
- Some practical tips for SMSF gearing going forward

Presenter Profiles

Dr Tony Rumble *Founder, Alpha Structured Investments*

Tony has been working in the investment banking and financial planning industry for over twenty years. During the mid 1990s Tony taught in the area of derivatives and structured products at the University of New South Wales, where he was awarded his PhD in 1999. Tony founded his current businesses LPAC Online Pty Ltd and Alpha Structured Investments Pty Ltd in 2000 and 2004 respectively.

Virginia Graham *Principal, Model Mortgages*

Virginia is a qualified financial planner and has previously worked for ANZ Bank's Treasury department as an interest rate dealer and for stockbroker firm Salomon Smith Barney. Virginia has a Bachelor of Commerce and most recently has hosted a series of finance videos for the Sydney Morning Herald and the Age.

Michael Hallinan *Lawyer, Townsends Business & Corporate Lawyers*

Michael is a superannuation, financial services and insurance lawyer with over twenty years legal and superannuation experience gained in private and corporate counsel positions.

Jo Highway *Director, SMSF Outsource Solutions*

Jo is a Chartered Accountant, accredited SSA and SSAud, and Chairperson of the SPAA NSW Central Coast sub-Chapter. She holds a Bachelor of Commerce as well as Diplomas of Financial Services in Superannuation and Financial Planning. Jo's independent SMSF audit practice based in Gosford currently audits over 1,500 funds Australia-wide.



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