



FRIDAY 27TH SEPTEMBER

9.00am to 1.00pm

A STRATEGIC REVIEW OF YOUR SMSF

Trust Deed, Contribution Rules, Estate and Incapacity Planning.

Julie Dolan

The Best laid wealth accumulation and retirement plans can go terribly wrong if your Trust Deed, Contribution arrangements, Estate or Incapacity plans are not current or valid. What results can be very expensive for yourself and a stressful time for your loved ones.

Join us for an **interactive** and thought provoking half day workshop with interaction within your table group and combined workshop. A workbook will be provided.



Julie Dolan - SMSF Blueprint & Direct KPMG, SMSF Centre of Excellence

Julie has extensive experience of over 25 years in the SMSF Industry and has been part of the SMSF journey from the start.

She has deep experience in multiple facets of the accounting, wealth and SMSF sector and has been involved in many roles within these sectors and has provided strategic/technical support, education and consulting services to hundreds of accountants, advisers and lawyers around Australia. She regularly writes for industry publications and has also had the pleasure of educating thousands of SMSF Trustees.

Julie is currently a director for KPMG. Her role is to run the **SMSF Centre of Excellence** on a national basis. She is also the founder of SMSF Blueprint, an online interactive knowledge centre dedicated to SMSF Trustees.

SMSF Half Day Workshop

Venue:

The Chatswood Club
11 Help Street
Chatswood NSW

Time:

8.30am Registration
for 9.00am Start

[Book here](#)
or 1300 555 061

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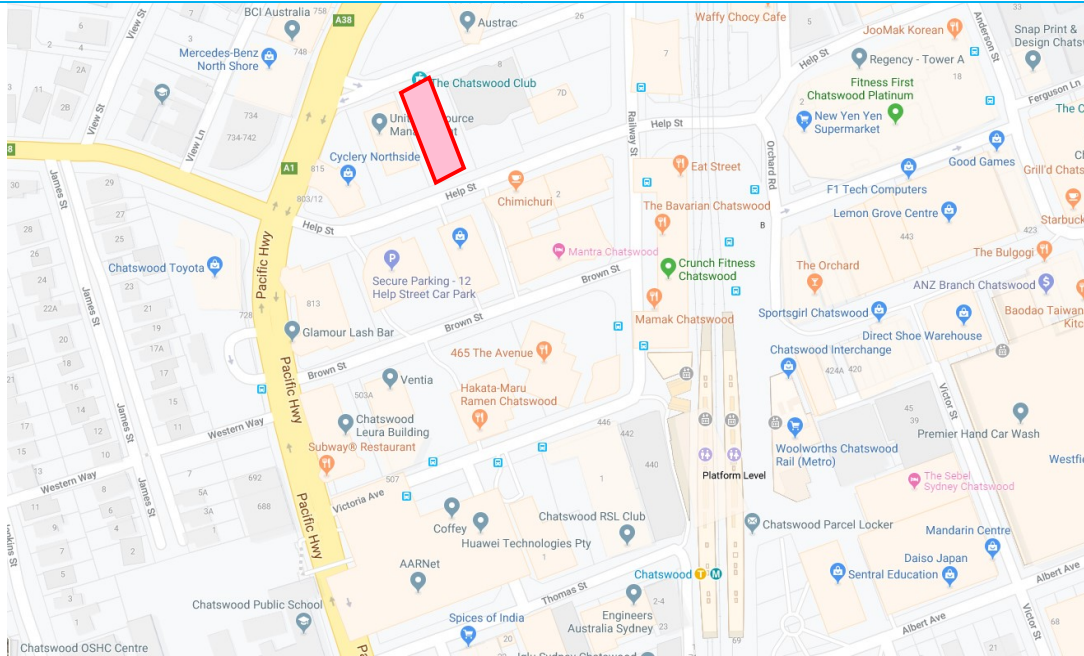
Explore what's needed to be considered when putting in place an effective Deed, Reviewing your TBC & Contribution arrangements and valid Estate or Incapacity plan. Even more so, leave the session with a list of 'must do's' for your personal situation. Invaluable advice that would normally cost you thousands of dollars in professional fees.

The workshop will be driven via a series of case studies that will cover off a diverse list of issues in relation to this important topic.

The presentation will cover diverse topics, including maximising the amount you can get into your fund, retirement planning, and what to consider in relation to taxation, incapacity and estate planning.

*Julie is flying in from Queensland especially for this meeting.
Look forward to an interactive and engaging session!*

Note that this event is strictly limited to 54 attendees, so don't delay your booking!

Location:	
Transport:	Train to Chatswood station and a short walk, or drive – see parking options below.
Parking:	Secure Parking , 12 Help St Chatswood (Entry via Brown Street). Early bird parking is available if you enter by 10.00am, but you cannot exit until 3.00pm, or Westfield Chatswood Anderson Street Carpark , 5 hours for \$25.
Cost:	AIA Members \$60, Non-members \$95. Includes refreshments.
Refreshments:	Continuous Tea & Coffee along with fresh fruit salad and fresh pastries for morning tea
Information:	Event Coordinator, Peter Dawson E: peterscott.dawson@gmail.com