



TR 2011/D3

What Does it Really Mean for SMSFs?

Speakers:	Jemma Sanderson, Principal, Cooper Partners Financial Services
Location:	Jackson McDonald Level 25, 140 St Georges Terrace, Perth WA
Date:	Thursday 20 October 2011
Time:	5:30pm – 7:30pm
Cost:	\$20 (members) and \$70 (non-members)
Format:	Speaker Presentation



Topic:

On 13 July 2011 the ATO released Taxation Ruling 2011/D3, which confirmed their long held view with respect to the cessation of a superannuation pensions upon a member's death. Since the draft was released there has been much debate in the media and the industry with respect to the implications of the draft ruling, particularly from a capital gains tax perspective. In this session Jemma will outline:

- What the draft ruling really means for members of Self Managed Superannuation Funds (SMSFs);
- The implications for beneficiaries;
- Strategies to put in place within the fund and with respect to the member's overall succession planning;
- Other areas of concern outlined in the draft;
- The implications with respect to what the draft does not say.

About the speaker:

Jemma Sanderson is a Principal of Cooper Partners Financial Services, heading up their SMSF specialist services. Jemma provides strategic advice on SMSFs, estate planning and wealth management to clients, as well as technical support to accounting, legal and financial planning groups. Jemma has over ten years experience in developing complex strategies for high net worth clients. Prior to joining Cooper Partners in June 2008, Jemma worked for Grange Securities and subsequently Lehman Brothers Australia as a Strategic Planner for three and a half years, after working in a similar role at Goldman Sachs JBWere.

Jemma has a Bachelor of Commerce from UWA and is a Certified Financial Planner and a Specialist Member of the Self-Managed Superannuation Professionals Association of Australia (SPAA). Jemma is a regular presenter on superannuation and SMSFs for the TIA, ICAA, CPA and SPAA across Australia. Jemma is the author of the Taxation Institute of Australia's popular publication the SMSF Guide, now in its third edition.



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Drinks and canapes will be provided
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