

ADVANCED TECHNICAL CPD WORKSHOPS

Champagne Reception proudly sponsored by MLC
featuring the annual FPA Awards presentation



Are you a financial planning practitioner looking for advanced insights and technical strategies to take your professional development to the next level?

Join your professional colleagues in an exclusive half-day interactive workshop designed by the FPA in conjunction with highly regarded expert facilitators and earn up to six FPA and SPAA CPD points. This will be followed by a complimentary Champagne Reception proudly sponsored by MLC, and the 2012 FPA Awards presentation.

Choose two of the following sessions:



THE TAX INSTITUTE

Integrating trusts into your advice process

Identify the tax and legal issues that arise from a trust deed 'case study'.

- Examine different types of trusts
- Distinguish the roles of key parties involved in a trust
- Use trusts as part of strategic advice solutions
- Determine how to establish a trust
- Identify the legal and tax impacts of a trust
- Avoid some common traps when setting up a trust
- Presented by [TBC]



**AGED
CARE
STEPS**

Building your Aged Care value proposition

Challenge yourself to incorporate aged care strategies into your advice offering.

- Identify opportunities to raise aged care issues with clients
- Create whole-of-family solutions
- Work through real-life case studies to develop a service offering, implement an aged care advice process and build strategies addressing issues with bonds, gifting, annuities and working with couples
- Presented by Louise Biti CFP®, Founder and Director of Strategy Steps and Aged Care Steps.



CAVENDISH

Planning for death in Self-Managed Super Funds

Examine the strategic issues and opportunities to add value when advising SMSF trustees.

- Plan to protect your client's interests after death
- Identify the tax impact in the event of death
- Workshop case studies to highlight the tax consequences before and after death of life insurance, limited recourse borrowing, sole purpose testing, in-house assets and estate planning
- Presented by David Busoli, Head of Education.

Places are strictly limited so book now at www.fpabestpractice.com.au/advancedcpd

BRISBANE 9 NOVEMBER | MELBOURNE 16 NOVEMBER | ADELAIDE 23 NOVEMBER | SYDNEY 7 DECEMBER | PERTH 13 DECEMBER



FINANCIAL PLANNING
ASSOCIATION *of* AUSTRALIA

Platinum Sponsor



EXCLUSIVE MEDIA PARTNER



INSPIRING ADVICE

CELEBRATING
20
YEARS
1992-2012
FINANCIAL PLANNING
ASSOCIATION OF AUSTRALIA

ADVANCED TECHNICAL CPD WORKSHOPS

Champagne Reception proudly sponsored by MLC
featuring the annual FPA Awards presentation



Attendee details

Name	
Company	
Address	
Phone	Mobile
Email	
Dietary requirements	

Advanced Technical CPD Workshop Registration

To register for the workshop sessions please complete below.

Workshop location selection (please select one location)

☐ Brisbane ☐ Sydney ☐ Melbourne ☐ Perth ☐ Adelaide

Workshop topic selection (please select only **two** sessions you would like to attend)

☐ Aged care ☐ The creation of trusts ☐ Death & taxes in an SMSF

Workshop registration type (please select one)	Cost (GST inclusive)
<input type="checkbox"/> FPA Member Member ID:	\$95
<input type="checkbox"/> Employee of an FPA Professional Practice Professional Practice name:	\$95
<input type="checkbox"/> Employee of an FPA Professional Partner Professional Partner name:	\$95
<input type="checkbox"/> Non Member	\$195

An attendee list will be made available for this event. Each listing will include the attendee's name, company, state and social media contact. If you do not wish to be included in the attendee list, please opt out by ticking here ☐
If you do not want your details provided to the event supporters please tick here ☐

Payment

☐ Cheque is enclosed (Made payable to Financial Planning Association)

☐ MasterCard ☐ Visa ☐ Amex

Card number / /

Expiry date / CVV (AMEX is on front of card)

Cardholder name

Cardholder signature

Amount (GST inclusive) \$ Date / /2012

Advanced Technical CPD Workshops, accredited by the FPA and SPAA for up to 6 CPD points, presented by:



CAVENDISH



THE TAX INSTITUTE

Tax invoice

Financial Planning Association of
Australia Limited
ABN 62 054 174 453
3 October 2012

With thanks to our Platinum Sponsor:



Registration includes:

Attendance to 2 CPD workshop sessions
Afternoon Tea
Champagne Reception
Note: Reduced pricing does not apply for part attendance.

Dates & Locations

Brisbane - Friday 9 November

Stamford Plaza Brisbane

Melbourne - Friday 16 November

Etihad Stadium (Docklands)

Adelaide - Friday 23 November

Mercure Grosvenor Hotel

Sydney - Friday 7 December

Hilton Sydney

Perth - Thursday 13 December

Perth Convention & Exhibition Centre (PCEC)

Program

11.30am Workshop registration
12.30pm Workshop sessions start
2.30pm Afternoon Tea
5.30pm Champagne reception and awards ceremony

To book

Rebecca Chan

Events Coordinator

GPO Box 4285

Sydney NSW 2001

Fax 02 9220 4580

Email events@fpa.asn.au

Phone 02 9220 4529 (enquiries)

Cancellation Policy: No refund will be available where cancellations are made 10 days prior to the event date, and/or where there has been non-attendance on the day. A substitute delegate may attend in place of the original nominated delegate when advised in writing prior to the event. Privacy Policy: Information collected on this form is used to arrange and cater for this event, and may be stored for analysis and planning for future events. Please refer to the FPA privacy policy on the website: www.fpa.asn.au Disclaimer: Participation in FPA events is wholly at the risk of the attendee. The attendee agrees that he/she will not hold the FPA liable for any illness, personal injury or loss of property sustained during or as a result of taking part in an FPA event, whether caused by the negligence or misconduct of FPA or its servants and agents.