



Superannuation Intensive

 24-25 Mar 2026

 CPD 8

The Tax Institute gratefully acknowledges the generous assistance of members of the Organising Committee:

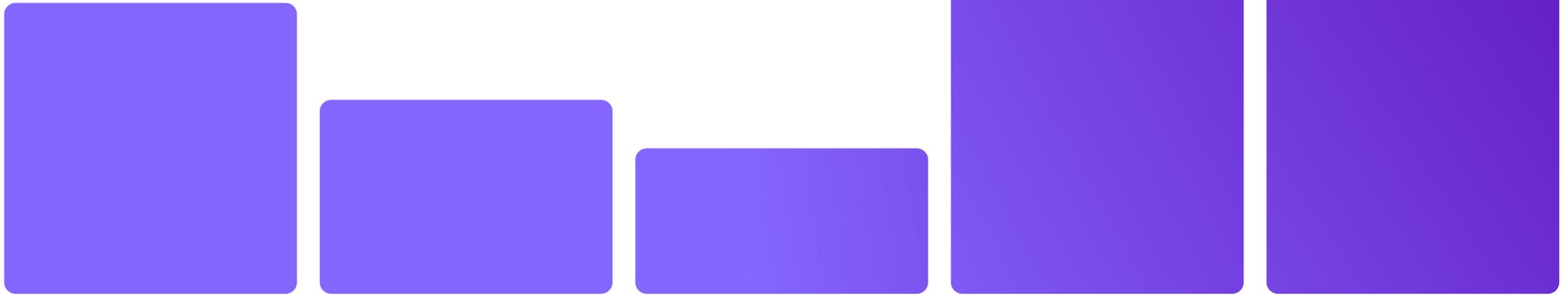
Liz Westover, FTI, Deloitte, Chair, Superannuation Intensive Organising Committee

Nicholas Panos, CTA, N Panos & Associates Solicitors

Jemma Sanderson, CTA, Cooper Partners Financial Services

Shirley Schaefer, BDO

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Welcome

On behalf of The Tax Institute and the Organising Committee, I am delighted to invite you to attend the 2026 Superannuation Intensive.

Presented online over two days on 24 & 25 March, the 2026 event will feature highly practical sessions on a range of current and relevant topics for SMSF professionals.

Our expert speakers will ensure delegates are provided with the latest developments and strategies to assist them in guiding and supporting their clients. They will receive an update session, recapping changes in the industry over the past 12 months and hear from the ATO on their major areas of focus. Other sessions are, as always, highly relevant for today's SMSF advisers and include Division 296 tax, contributions, pensions, estate planning and SMSF audit.

Our final session will bring together a panel of experts to discuss and analyse the latest in SMSF investment trends. This session will look at where trustees are investing their retirement savings and discuss the existing and emerging risks and challenges they face.

The superannuation industry continues to evolve at pace. As trusted advisers, this necessitates staying abreast of the latest developments in our industry and understanding the impacts of these changes on our clients. The Superannuation Intensive promises to deliver to help you do just that.

I look forward to seeing you online.



A handwritten signature in black ink that reads "Liz Westover".

Liz Westover, FTI
Chair, Conference Organising Committee

Early bird pricing offer
Register on or before 27 February 2026 to save!

Technical program

Day 1 Tuesday, 24 March 2026

Time *AEDT	Session
10:25-10:30am	Welcome and opening address
10:30-11:30am	<p>Session 1: SMSF update Speaker: Liz Westover, FTI, Deloitte</p> <p>Liz Westover returns for the first session of the Intensive to place her practical lens on the latest developments in the SMSF industry. This session will provide updates on:</p> <ul style="list-style-type: none">• Recent legislation;• ATO focus and other announcements; and• Rates, thresholds and rulings. <p>This session will look at key issues for practitioners and advisers as we start the approach to another end of financial year.</p>
11:30am-12:00pm	<p>Session 2: ATO update Speaker: Alister Boyes, Australian Taxation Office</p> <p>As the Regulator for SMSFs, it is critical for practitioners and advisers to understand focus areas of the ATO in the SMSF space. Hear from the ATO on areas of concern, including consideration of common compliance breaches and areas of heightened risk.</p>



Technical program

Day 1 Tuesday, 24 March 2026 continued

Time *AEDT	Session
12:00–12:30pm	Lunch
12:30–1:30pm	<p>Session 3: Pensions – New dimensions Speaker: Julie Steed, MLC TechConnect</p> <p>Legacy pensions received a reprieve of being commutable under a five-year amnesty, and whilst minimum pension payment rules have always mattered, the stakes recently became significantly higher.</p> <p>In this session we will review the considerations when determining whether to commute a legacy pension and review the significant changes to the ATO's updated guidance regarding the consequences and rectification process for underpaid pensions.</p>
1:30–2:30pm	<p>Session 4: Beyond re-contribution strategies ... the other ways to minimise death benefits tax Speaker: Craig Day, Colonial First State</p> <p>Re-contribution strategies are a well-known and effective strategy that can be used to minimise death benefits tax where a client's super is paid to a non-dependant beneficiary. But what other strategies are available, and how do they work?</p> <p>In this presentation we take an in-depth look at the different strategies that can be used to legitimately minimise death benefits tax, as well as related estate planning issues advisers need to be aware of.</p> <p>Topics discussed include:</p> <ul style="list-style-type: none">• Withdrawing benefits prior to death – the latest thinking, relevant issues and important cases• Paying death benefits via the estate – the direct and hidden tax benefits vs the risks; and• Making an adult child a financial dependent – when this may work, and when it won't.
2:30–3:00pm	<p>Session 5: The future of Superannuation Speaker: Neil Sparks, Findex</p> <p>The future of superannuation is constantly evolving, and understanding emerging trends is key for advisers and members alike. This session will explore the direction of the industry, leveraging ATO statistics, Class benchmark reports, and other recent trend analyses to provide insights into what's shaping superannuation now and in the years ahead.</p> <p>This session will discuss:</p> <ul style="list-style-type: none">• Key trends and the future direction of superannuation;• Insights from ATO statistics, Class benchmarks, and industry reports; and• Implications for members, advisers, and strategy planning.

Technical program

Day 2 Wednesday, 25 March 2026

Time *AEDT	Session
10:30-11:30am	<p>Session 6: Div 296 Speaker: Jemma Sanderson, CTA, Cooper Partners Financial Services</p> <p>This session will outline the announced changes and how they will impact your clients, including the comparison of them to the previous draft measures. This session will also include examples of the calculations and their impact.</p>
11:30am-12:30pm	<p>Session 7: War stories Speakers: Shirley Schaefer, BDO, Matina Moffitt, BDO</p> <p>The SMSF auditor often sees the worst of SMSF scenarios, whether its structural issues, investment issues or just really poor record keeping. Shirley and Matina will use their recent experiences with the ATO to bring to light the key issues that all SMSF professionals should consider. This session will include discussions on:</p> <ul style="list-style-type: none">• Valuations and arm's length matters;• The ATO's audits of SMSF auditors; and• The key areas of concern for the ATO and by default for SMSF trustees.
12:30-1:00pm	Lunch
1:00-2:00pm	<p>Session 8: Contributions Speaker: Tim Miller, Smarter SMSF</p> <p>Superannuation contributions are a key area for effective tax planning, wealth accumulation, and managing compliance risks. It is also important to be aware of the nuances in the contribution provisions and the impact when an excess arises. This session will discuss:</p> <ul style="list-style-type: none">• Year-end strategies to optimise contributions and minimise tax;• Tips and traps to ensure there are no adverse consequences;• How to manage and address excess contributions; and• Practical approaches and planning strategies for super contributions.

Technical program

Day 2 Wednesday, 25 March 2026 continued

Time *AEDT

Session

2:00 – 3:00pm

Session 9: Trends and investments – Panel session

Speakers: Clinton Jackson, Cooper Grace Ward, Shirley Schaefer, BDO, Liz Westover, FTI, Deloitte

Facilitator: Nick Panos, CTA, N Panos & Associates Solicitors

One of the main reasons for establishing an SMSF is to gain greater control over how and where to invest superannuation savings. However, the only problem is that there is minefield of rules that need to be properly navigated in order to stay out of trouble. The focus of our panel session this year will be on issues in relation to investments by SMSFs.

In this session, our expert panel will discuss:

- What are the latest trends in investments by SMSFs?
- Investments in private companies and unit trusts – What are the risks?
- What can wrong with investing in crypto currency?
- SMSFs investing offshore including in overseas properties and other exotic type investments;
- How to properly structure investments by SMSFS; and
- The ATO focus and areas of concern.



Presenters

Alister Boyes has dedicated over 30 years to the Australian Taxation Office, with a career largely focused on shaping and implementing new policy initiatives. His contributions have included driving various reforms including changes to employee share schemes, small business concessions, and personal income tax cuts. Prior to his current role, Alister served as Assistant Commissioner of Technical Leadership and Advice within the Individuals and Intermediaries business line, which was responsible for providing strategic guidance on complex tax matters. In October 2024, he took on the role of Assistant Commissioner for the Self-Managed Super Fund Regulatory Branch, where he leads a team dedicated to protecting retirement savings and upholding public confidence in the self-managed super fund system.

Craig Day is the Head of Technical Services for Colonial First State and has over 25 years' experience in the financial services industry. In his role, Craig is responsible for providing specialist technical support to financial advisers. Craig holds a Masters of Taxation (financial planning) and is a Fellow Member of the SMSF Association.

Clinton Jackson is a partner in Cooper Grace Ward's commercial team, advises his clients on an extensive range of commercial and corporate matters, business mergers, acquisitions and sales, tax and structuring issues, self-managed superannuation, asset protection and succession, restructuring and exit strategies. Clinton's unique range of expertise enables him to assist his clients with both their personal and business legal issues and to advise through all phases of the business/investment lifecycle – from start-up, to growth, expansion, transition and exit. Clinton is an accredited SMSF Specialist Advisor with the SMSF Association and a member of the Society of Trust and Estate Practitioners.

Tim Miller is the SMSF Technical & Education Manager at Smarter SMSF. He is a well-known figure within the SMSF industry, having worked in numerous technical and education roles over his 20+ year industry journey. He has aided in the accreditation of over a thousand financial planners and accountants, is a regular presenter and contributes to all SMSF mainstream publications. Tim is a Fellow SMSF Specialist Adviser (FSSA) with the SMSF Association, and received the CEO's Award at the SMSF Association National Conference 2023 in Melbourne for his contribution to the SMSF industry.

Matina Moffitt is a partner in Financial Services – Superannuation at BDO. Matina has over 35 years' experience in audit, with the last 33 specialising in audit and accounting for superannuation funds. Matina's experience in the superannuation industry includes assurance advisory services, including development of risk management frameworks, corporate governance reviews for superannuation trustees and reviews of processes and procedures designed to ensure compliance with relevant legislation and corporate policies. Matina is a registered SMSF auditor, as well as a registered company auditor. Matina is a Fellow member of Chartered Accountants Australia and New Zealand (CAANZ). A Member of the SMSF Auditor Professional Association Stakeholder Group (members comprise representatives from professional bodies, the Australian Taxation Office, and Australian Securities and Investments Commission) and a regular presenter at a number of conferences, presenting on SMSF audit issues.

Nick Panos, CTA, is an experienced specialist solicitor with over 36 years in practice and is also the principal of N. Panos & Associates a highly respected boutique law firm. He specialises in all areas of tax law, superannuation (with particular emphasis on SMSFs),

business and company law, estate planning, business succession planning, asset protection planning, trusts and general commercial matters. Nicholas' clients include small to medium size enterprises and high net worth individuals. He holds a Bachelor of Economics Degree, a Bachelor of Laws (Honours) Degree and a Masters of Law Degree all from the University of Sydney. Nicholas has been accredited by the Law Society as a Business and Personal Taxation Law specialist, he is a member of the Law Society, a member of the Law Society Specialist Accreditation Business and Personal Taxation Law Advisory Committee, a Chartered Tax Advisor of The Tax Institute and a member of The Tax Institute NSW State Council.

Jemma Sanderson, CTA, is a Director 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 and consultancy accounting, legal and financial planning groups. Jemma has over 20 years' experience in developing complex strategies for high net worth clients. Jemma is a regular presenter on superannuation and SMSFs for the professional bodies across

Presenters

the country, and is the author of The Tax Institute's popular publication for SMSF Advisers, the SMSF Guide, in its ninth edition. Jemma was named the SMSF Adviser of the Year at the 2019 National Women in Finance awards for the third year in a row and received the SMSF Association Chairman's Award in February 2018 for her contribution to the industry

Shirley Schaefer is one of the Superannuation leaders at BDO, an auditor by training and a SMSF expert by choice. Shirley is a regular speaker at superannuation, SMSF and Audit conferences. She provides SMSF competency training for accountants and auditors and is the co-author of the Thomson Reuters SMSF Audit Guide.

Julie Steed is the Senior Technical Services Manager at MLC TechConnect, with more than 30 years of experience in the superannuation industry as a technical specialist, consultant and client services manager. Julie is responsible for the provision of superannuation technical information, specialising in small funds. Julie is passionate about helping people with the technical aspects of super, keeping it simple and in helping practitioners provide quality services to their clients. She is a regular speaker at industry conferences and training

events and is a regular contributor to industry publications. Julie is a Fellow and accredited SMSF Specialist Advisor™ with the SMSF Association, a Senior Fellow of Finsia and a Fellow of ASFA. Julie was awarded the SMSF Association's 2020 Chair Award for outstanding contribution to the SMSF industry.

Neil Sparks is a recognised leader in the SMSF sector with more than 20 years of experience across superannuation strategy, technical services, and education. He is known for making complex super concepts clear, practical, and easy to apply. He has held senior industry roles, including National Manager ' SMSF Strategy at BT Financial Group and Head of Membership and Corporate Development at the SMSF Association. Neil is a Fellow SMSF Specialist Adviser (FSSA™), holds a Graduate Certificate in SMSF from the University of Adelaide, and is currently completing his Master of Financial Planning. Now an Associate Partner ' SMSF Advisory at Findex, Neil supports regional teams and contributes to national strategy, trustee engagement, and thought leadership. Neil is a regular presenter who is valued for his clear communication style, practical insights, and relatable take on the quirks of Superannuation and SMSF.

Liz Westover, FTI, is a Partner and National SMSF Leader at Deloitte. She is responsible for the firm's SMSF service offering, providing compliance and advisory services to the firm's clients. Liz has extensive experience in superannuation and has strong capabilities on the technical and practical application of superannuation and associated tax laws. She is a regular commentator on superannuation and self-managed super funds (SMSFs) having presented and authored

articles on these and related issues for many years. Liz has been involved in superannuation policy development and advocacy, regularly liaising and consulting with Government, regulators and stakeholders on technical, legislative and policy matters. She is a Fellow of The Tax Institute, Fellow Chartered Accountant, CA SMSF specialist and holds a Master of Legal Studies from the University of New South Wales and a Bachelor of Business from the University of South Australia.



Event information

Confirmation of registration

Please note you will receive two separate emails in the form of a tax invoice at the time of payment and a confirmation email at registration completion.

Continuing Professional Development (CPD)

Attendance at the conference counts for 8 hours of CPD with The Tax Institute.

SMSF Association Accreditation

This event is accredited with the SMSF Association and as such, attendance counts for 8 hours of CPD with the SMSF Association

The Tax Institute's attendee hub

This event will be accessible to all delegates via our dedicated attendee hub. Program information, materials (technical papers and presentations), survey forms and more will be available via The Tax Institute's virtual attendee hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the attendee hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual attendee hub by email.

Delegate list

A delegate list will be included on the attendee hub to assist with networking. Please indicate at the time of registration if you do not want your name to be

included. Alternatively, you can edit your profile visibility settings in the virtual attendee hub at any time during the event.

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

Privacy

We take your privacy seriously, and our policy can be viewed at: <https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer>.

Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or nationalevents@taxinstitute.com.au.

For registration enquiries, please contact customeradmin@taxinstitute.com.au.



Registration

Registration inclusions

Online access to presentations
and technical papers

Full registration

This registration option entitles one delegate to attend the entire event.



Day registration

This registration option entitles one delegate to attend a full day of technical sessions.



Discounts

Early bird registration

All registrations received and paid on or before Friday, 27 February 2026 will be entitled to an early bird discount.

Group discounts

Purchase three full registrations (early bird or standard) and receive a fourth full registration for free. The free fourth registration must be of equal or of less value to the three paid registrations.

This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

Register now!



Register online ▶

Register via form ▶
included in this brochure



A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

1 Registration

Please see page 11 for registration inclusions.

Full registration – 8 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before 27 February 2026	<input type="checkbox"/> \$945	<input type="checkbox"/> \$1,340	<input type="checkbox"/> \$1,245
Standard registration Register after 27 February 2026	<input type="checkbox"/> \$1,145	<input type="checkbox"/> \$1,540	<input type="checkbox"/> \$1,445

I understand that the registration fees do not include printed materials. Access to materials will be electronic.

*Become a member and save!

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and:

- save over \$230 on Affiliate membership on the first 12 months
- access member-only prices to this and future events
- access all member-only technical resources.

Find out more about membership at taxinstitute.com.au/membership

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature:

JOIN TODAY

2 Delegate contact details

Member no.: If your member details are up-to-date, you can skip this section.

Title: Mr Mrs Miss Ms

Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb:

State:

Postcode:

Telephone:

Mobile:

Email:

Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking

4 Payment method

Please note: all registration payments must be made prior to the event, unless other arrangements have been made with The Tax Institute.

Cheque payable to The Tax Institute (in Australian dollars)

Credit card Card type: AMEX Visa MasterCard Diners

Name on card:

Card no.:

Expiry date:

Cardholder's signature:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

3 Payment summary

Registration fees

\$

Total payable

\$

Please note: The Tax Institute cannot accept responsibility for delegates' late flight arrivals. Transfer costs are non-refundable and non-transferable.

Collection notice: The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

To register

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Online taxinstitute.com.au

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