

Order Form

NTAA Member No:

Registrant (1):
Please tick course of choice: PS 146 SMSF

Registrant (2):
Please tick course of choice: PS 146 SMSF
(please photocopy where more than 2 registrants)

Business Name:

Address:

Phone:

Fax:

Email:

Payment details

I enclose a cheque to InterPrac Securities Pty Ltd. \$

I wish to pay by credit card \$

Mastercard Visa Bankcard
(Unfortunately Amex and Diners payment options are not available on this product.)

Card No.

Expiry Date:

Name on Card:

Signature:

Special Offer for NTAA Members

This course is offered exclusively to NTAA members and their staff at a great price exclusive of GST (as it is an accredited training program).

PS146 course fee schedule

Number of Registrants	Unit cost per registration	Total cost
1	\$1,800	\$1,800
2	\$1,800	\$3,600
3	\$1,710	\$5,130
4	\$1,620	\$6,480

Further discounts apply for larger orders, please enquire.

For the first and second registrations, students receive a bound copy of the study material. Further bound copies can be purchased for \$99 each. If an email address is included on the order form, a PDF version of the material will be emailed.

SMSF Specialist Course fee

SMSF course fee **\$320** per applicant – GST exempt

The SMSF Specialist Course Only \$320 exclusive to NTAA Members

This ASIC approved course has been written with practising accountants in mind to give them the tools to advise clients on their SMSFs. Graduates of this course receive a certificate which is recognised throughout Australia.

The course will help you understand the range of complex and changing issues. You will be able to meet your obligations as an adviser and also help the trustees meet theirs.

Recognised accountants will be able to advise on the establishment, structuring, operation and valuation of a SMSF without an AFS licence, however training is strongly recommended.

Course Outline

- ✓ Provide advice in SMSFs
- ✓ Invest SMSF assets
- ✓ Support trustees in the selection and performance monitoring of outsourced services
- ✓ Advise on taxation and legislative requirements for SMSFs

For more details please call us or go to our website, www.interprac.com.au

What you get

Students receive well written, thoroughly researched, ASIC approved, learning material. This material is designed to be kept as an ongoing reference, for use as and when issues arise in practice. The material has been developed by highly-trained and experienced education and finance professionals.

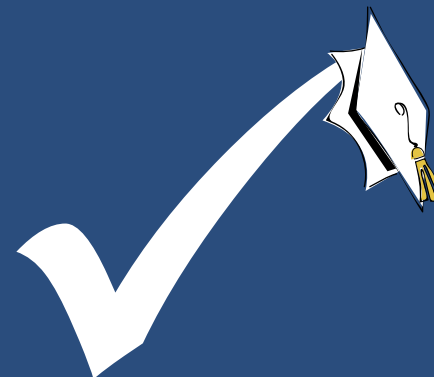
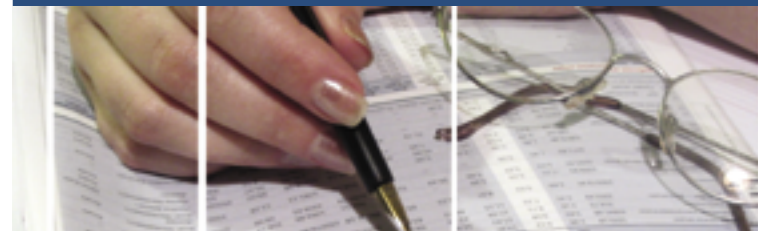
Course provider

The course has been designed and is administered by FEEST Financial Training, a Registered Training Organisation (Provider Number 21431) listed on the ASIC Training Register. All awards issued carry the following logo, which is recognised in all States and Territories of Australia as having met the high standards of the Australian National Training Authority.



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InterPrac Ltd. and NTAA Ltd. will financially benefit from the above arrangements.



NTAA solution to the FSRA crisis!

Building a complete accounting practice



NEW!!
ASIC Approved Course
SMSF Specialists
Course

How? A Simple FSRA Course for Accountants

What are the advantages of being licensed?

- ◆ Respond to more client demands
- ◆ Ensure your clients have an adviser they can trust
- ◆ Advise with confidence on a broader array of tax and superannuation issues
- ◆ Increase opportunities to offer value added advice
- ◆ Service all of your small business clients' needs
- ◆ Increase the value of your practice
- ◆ Avoid referring clients to external advisers
- ◆ Reduce your exposure to inadvertent breaches of the FSRA (accountants are in the firing line)
- ◆ Participate in the expansion of the SMSF industry

Common FSRA breaches

Accountants who advise in any of the following areas risk prosecution under FSRA:

- ✓ Clients splitting super contributions with their spouse
- ✓ Clients buying or selling business assets which include shares or units in other entities
- ✓ Acting on a financial plan prepared by a financial planner
- ✓ Advising clients to enter into a dividend reinvestment plan
- ✓ Advising clients on buying, selling or holding investments as part of an SMSF's investment strategy
- ✓ Advising clients on making additional or voluntary contributions to an SMSF
- ✓ Advising clients on starting a pension from their SMSF

Benefits of OUR training

- ❑ It's ASIC approved
- ❑ No class time!! Streamlined study and assessment by mail
- ❑ If you don't pass the first time, simply resubmit the assessment for no extra charge
- ❑ We send your results and certificate upon completion
- ❑ It automatically results in a Diploma of Financial Services (DipFS)
- ❑ You are qualified to become an Authorised Representative
- ❑ Support from an experienced trainer whenever you need help – yes, that's right whenever you need help
- ❑ Tailored for accountants
- ❑ It focuses on the issues that confront accountants in practice
- ❑ Extremely competitively priced

Course Outline

- ◆ **Module One: Financial Planning and Generic Skills**
- ◆ **Module Two: Superannuation (Inc. SMSFs)**
- ◆ **Module Three: Securities and Managed Investments**
- ◆ **Module Four: Insurance (Life & General)**

Let's get licensed

A Two Stage Process

There are two distinct stages to become licensed under the FSRA

- ✓ Initially, you must complete the academic component to satisfy ASIC. This is known as PS 146; and
- ✓ You need to become an Authorised Representative of an AFSL*.

Step 1 – The Accreditation Process

We have tailor-made a course, – accredited with ASIC. This course specifically meets the needs of accountants who want to service the general needs of their clients.

For those accountants who want to embrace financial planning, the course provides robust training which is a launching pad to becoming an Authorised Representative.

Step 2 – Becoming an Authorised Representative

Once you have obtained your PS 146 accreditation you will be in a position to become an Authorised Representative of an AFSL and then begin to advise your clients.

Naturally, you're free to approach any licence holder but we've tried to make this easy by providing two outstanding options. We will include these in our course material or check our website for more details.

* AFSL – Australian Financial Services Licence

The FSRA is the Financial Services Reform Act which came into effect on 11 March 2004. **ASIC has signalled that it will now vigorously enforce sanctions against accountants and others who give advice without proper authority.**

We encourage you to compare our training with any competitor!