

Topdocs Super Fund Borrowing Webinar

A practical and comprehensive SMSF Borrowing presentation

With borrowing in Super continuing to increase, your clients are likely to be looking to you for advice and assistance with their SMSF Borrowings.

To provide the best advice to your client's you need to be aware of the ATO and Lender requirements pertaining to these transactions, as well as the steps required to ensure your client's borrowing is a smooth and successful process.

Topdocs has been at the forefront of Super Fund borrowing documentation and advice since the introduction of an SMSF's ability to borrow in 2007. Having documented hundreds of Super Fund borrowing transactions, we understand the ATO and Lender requirements, as well as the required documentation to facilitate your client's borrowings.

This one hour webinar (comprising of a 45 minute presentation with 15 minutes for questions) will arm you with the knowledge and tools required to ensure your client receives the maximum benefit from this investment strategy.

Topics discussed will include:

Borrowing Structures

- ❖ Legislative requirements of a Super Fund Borrowing
- ❖ Super Fund Borrowing Structure requirements

The ATO's views on Super Fund Borrowing

Discussion points will include

- ❖ What constitutes an 'acquirable asset'
- ❖ Properties you can and can't acquire
- ❖ Purchasing shares and commodities
- ❖ Refinancing Super Fund borrowings

Practical Considerations

- ❖ Who signs the Contract and when?
- ❖ Who should be the Bare Trustee?
- ❖ Stamp Duty, GST and CGT
- ❖ Guarantees

Lender Requirements

- ❖ Lender contacts, terms and conditions
- ❖ Lender Structure Requirements
- ❖ Related Party loans

Documentation required

- ❖ What documentation is required by the Lenders?
- ❖ What documentation is required by the Tax Office?

How to access the Webinar

A webinar is a presentation held over the internet. When you register for the webinar, you will receive details of the website to access on the day, including login details.

You will be able to view the presentation online, and listen via your computer or telephone line.

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Super Fund Borrowing Webinar Registration

About Topdocs

Topdocs is a leading provider of SMSF, Company and Trust documentation to Accountants, Financial Planners, Solicitors, Dealer Groups and Administrators.

Having provided the documentation for hundreds of Super Fund Borrowing transactions since 2007, Topdocs is the market leader when it comes to Super Fund borrowing documentation and advice, and conducts regular presentations on the topic.

Super Fund Borrowing Webinar - Dates and Times

Wednesday 14 September 2011

Start time: 10.30am AEST
Finish time: 11.30am AEST
Cost - \$55.00 including GST

OR

Thursday 22 September 2011

Start time: 4.00pm AEST
Finish time: 5.00pm AEST
Cost - \$55.00 including GST

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Super Fund Borrowing Webinar Registration

Register online at <http://www.topdocs.com.au/event-registration.html> or complete the Registration Form below and email it to support@topdocs.com.au or fax it to 03 8256 0108

Your Details

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Company / Organisation.....

Dealer Group.....

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State Postcode..... Phone

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Webinar Date (select one) Wednesday 14 September 2011 Thursday 22 September 2011

*Delegates will receive an email confirmation of their registration, including login details and tax invoice.

Method of Payment

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