



# SMSF News and Strategies Series

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## **Presented by:**

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CPA, FPS SMSF Specialist Advisor

## **Guest Host:**

**Sarah Power, Director of Business Concepts Group**  
specialising in Financial Planning and Accounting

## **Episode 57 – The Key Takeaways from the 2018 SMSF Association Conference**

In this episode we going to discuss some of the key takeaways from the SMSF Association Conference.

### **Key Points**

- SMSF and Estate planning
- Transfer balance cap issues
- Transfer balance account reporting obligations
- Downsizer opportunities
- Fund Documentation
- Extended lodgement date 30<sup>th</sup> June
- Labour policy on imputation credits

Make sure you are on top of your TBAR requirements and have had your estate planning reviewed. The 30<sup>th</sup> June is going to zoom up very quickly, so we encourage you to submit your TBAR requirements as early as possible. Review all your fund documentation as part of this to ensure everything is executed correctly. As always we are happy to talk about your super and your circumstances, contact us via our website [www.buscgroup.com.au](http://www.buscgroup.com.au) and we can give you a call.