

Workshops/Seminars for Businesses

We provide member educational workshops and seminars on superannuation specific material. This includes and is not limited to:

- How superannuation works:
 - Preservation rules – When can members access their benefits? What happens upon the incurrence of a permanent disability?
 - How long can money be kept in super?
 - How are the earnings and capital gains taxed?
- Superannuation contributions:
 - How much can employees contribute to their superannuation fund; pre tax and post tax?
 - Can they make spouse contributions?
 - How does this compare with gearing?
- Leaving the superannuation environment; what are the tax implications on:
 - Rollover?
 - Taking lumps sums?
 - Taking a fixed term, allocated or life-time pension?
 - Exceeding the Reasonable Benefit Limits?
- How do you best treat superannuation benefits in an estate planning context?
 - What assets/benefits should be bequeathed to adult dependents and minor dependents?