

Leenane Templeton

SMSF TRUSTEE SEMINAR

This seminar aims to give the trustees or would be trustees an insight into the issues and strategies available in self-managed or family superannuation funds.

Do you have a Self-managed Super Fund? or... are you thinking about a SMSF?

Timeless Investment Lessons – Paul Chin

This session will explore some investment lessons that have stood the test of time. Paul will demonstrate how investors can avoid the pitfalls of trying to time the market and take advantage of a low-cost, diversified portfolio by adopting a few key enduring investment strategies.

Success in timing the market remains elusive for many. Some believe investing is all about getting in before prices rise and getting out before prices fall, but only in the clarity of hindsight are market peaks and bottoms obvious.

The seminar includes five investment lessons put to the test of time:

- Do not try to time the market
- Annual rebalance
- diversify, diversify, diversify
- costs matter
- dollar cost averaging

Re-structuring of Personal Assets Through a SMSF – Andrew Frith

Change to superannuation laws now allow self-managed superannuation funds to borrow to invest in real property under certain specific conditions. Andrew looks at borrowing within a SMSF and the re-structuring of personal assets through a SMSF.

Who should attend?

This SMSF education seminar is of benefit to anyone who currently has a SMSF or is thinking of having one.

Presenters

Guest Speaker – Paul Chin

Senior Investment Analyst – Vanguard Investments

Paul is responsible for providing investment thought-leadership and research for Vanguard Investments as a member of the global investment research effort. He originally joined Vanguard to head the firm's Research & Technical Services Group. Paul has a wealth of experience and holds a Masters in Applied Finance & Investments (Finsia), a Bachelors of Commerce. For his full biography please click [here](#).

Andrew Frith BCom CA SSA

SMSF Specialist Advisor™ – CEO – The Self-Managed Super Specialists

Andrew is the founder of The Self-Managed Super Specialists and a leading expert in self-managed super funds. For more details visit www.self-managedsuperfund.com.au

LIMITED SPACES – BOOK NOW

To register for this seminar email events@leenanetempleton.com.au



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DATE

Wed 17 Oct 2012

TIME

5pm – 6.45pm

LOCATION

Board Room
Leenane Templeton
Lvl 2 134 King Street
Newcastle

COST

Clients – Free
Public – \$15 each
or \$25 per couple

SYDNEY

S&P/ASX200

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