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# Seminar Invitation

TAX

## Superannuation: Are you in Charge?

Many believe setting up a self managed superannuation fund (SMSF) is all it takes to give them complete control over what happens to their superannuation both during their lifetime and after death. Others resign themselves to having no control at all as they are not willing or able to set up a SMSF.

Neither view is correct.

It takes more than a SMSF to ensure you have ultimate authority and you can exert some control after death, even over commercial or industry funds.

In this seminar, Julie looks at some key issues to ensure you decide who benefits from your superannuation savings including:

- Lump sums and pensions;
- Loss of capacity;
- Superannuation after your death; and
- How much control you have and how to exert it.

This seminar is for anyone who has money or life insurance in a superannuation fund and wants to take control.

**Reserve your seat today.**

### Date & Time

**Thursday 28 April 2016**

5:45pm – 7:30pm

Drinks and canapes will be served

### Venue

**Boardroom**

**DW Fox Tucker Lawyers**

L14, 100 King William Street, Adelaide

### Cost

**No charge** - event provided compliments of DW Fox Tucker Lawyers

### RSVP

**By Friday 22 April 2016**

e: [events@dwfoxtucker.com.au](mailto:events@dwfoxtucker.com.au)

p: **8124 1811**

**We look forward to seeing you there.**



### Our presenter

**Julie Van der Velde** Senior Associate

Qualified as an accountant and lawyer, Julie has practised in both professions and now specialises in taxation law and equity, with a focus on trust taxation, superannuation and succession.

Julie is an Accredited Trust and Estate Practitioner and founder member of the South Australian Branch of the Society of Trust and Estate Practitioners (STEP); State Councillor CPA Australia; and Tax Institute Roundtable Committee Chair.

She has taught both equity and taxation law as a tutor at the University of Adelaide and regularly presents and facilitates taxation training sessions for a range of professional organisations, including The Tax Institute, CPA Australia, the Law Society of South Australia, Legalwise and STEP. More recently Julie has also been invited to address the Australian Taxation Office on the management of trust structures in accounting practices.