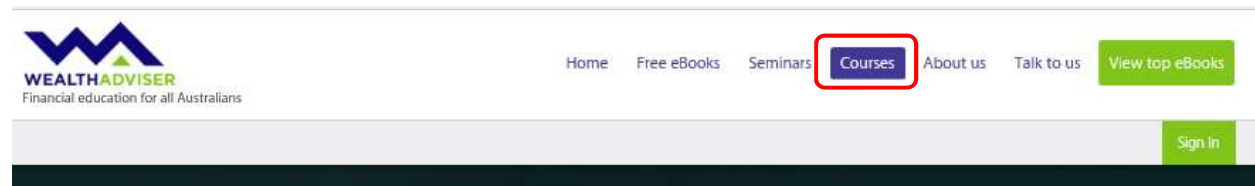


## Navigating the course

Access the available courses by selecting the **Courses** tab on [www.wealthadviser.com.au](http://www.wealthadviser.com.au)

If you are an existing user **Sign In**



The course overview page will list the lessons your course (there may only be one) and show your **progress** in the course.

**Course Help** can be accessed from every page within the Learning Management System.

The screenshot displays the course overview page for the "Complete SMSF Trustee Program". The page includes a course status of "In Progress", a description of the program, and a list of seven lessons. The first lesson, "Introduction to SMSFs", is marked as completed with a green checkmark in a box. A "Course Help" button is visible in the top right corner. Below the lessons list, there is a "Course Progress" section with a progress bar and a "Course Navigation" list of topics.

Lessons	Status
1 Introduction to SMSFs	✓
2 SMSF Trustee Responsibilities	☐
3 Contributing to Superannuation	☐
4 Withdrawing money from Superannuation	☐
5 SMSF Investment Rules	☐
6 Taxation of SMSFs	☐
7 Winding up an SMSF	☐

**Course Progress**

**Course Navigation**

- ▶ Introduction to SMSFs
- ▶ SMSF Trustee Responsibilities
- ▶ Contributing to Superannuation
- ▶ Withdrawing money from Superannuation
- ▶ SMSF Investment Rules
- ▶ Taxation of SMSFs
- ▶ Winding up an SMSF

Each topic within a lesson must be reviewed in sequential order.

To progress through each topic you must click on the **Mark Complete** button at the bottom of each page.

## SMSF Trustee Responsibilities

Running your own SMSF requires you to become a trustee of the fund and be actively involved. In order for your SMSF to receive tax concessions as a super fund you will need to comply with certain duties and obligations.

These are set out in the super rules and legislation and trust deed of the fund. Learn about reporting obligations, administrative duties and responsibilities and what penalties may be incurred for breaching the rules.

[Download PDF](#)

### Lesson Topics

- 1. Learning outcomes
- 2. Steps in establishing a self-managed super fund
- 3. Formulate and implement an investment strategy
- 4. Trustee administrative duties and responsibilities
- 5. Annual reporting obligations
- 6. Other trustee reporting requirements
- 7. Penalty regime
- 8. Learning Check
- 9. Assessment Instructions

### Quizzes

Status

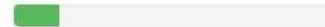
	Quizzes	Status
1	Assessment - SMSF Trustee Responsibilities	<input checked="" type="checkbox"/>

[Mark Complete](#)



[Course Help](#)

### Course Progress



### Course Navigation

- [Introduction to SMSFs](#)
- ▼ SMSF Trustee Responsibilities**
  - 1. Learning outcomes
  - 2. Steps in establishing a self-managed super fund
  - 3. Formulate and implement an investment strategy
  - 4. Trustee administrative duties and responsibilities

At the end of each course you will be requested to complete an Evaluation form.

## Assessment – SMSF Investment Rules

**Time limit: 00:14:30**

### Evaluation form

Please help us improve our course by responding to the following questions about your training experience. We value your feedback and where possible will endeavour to incorporate your ideas and suggestions into future courses.

Please select the answer that best describes your satisfaction with this course:

- |   |   |                                |                               |                             |                                      |
|---|---|--------------------------------|-------------------------------|-----------------------------|--------------------------------------|
| The course met my expectations.*                                | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |
| The course was relevant to me.*                                 | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |
| The content was arranged in a clear and logical way.*           | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |
| Feedback on the assessment questions and assisted my learning.* | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |
| The course was easy to use and navigate.*                       | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |
| The course materials were of a high technical quality.*         | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |
| I would consider enrolling in another course.*                  | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |
| Overall I enjoyed this course.*                                 | <input type="radio"/> Strongly disagree | <input type="radio"/> Disagree | <input type="radio"/> Neutral | <input type="radio"/> Agree | <input type="radio"/> Strongly agree |

Do you have any other comments?

Thank you for the time to complete the survey.

[Finish Quiz](#)