

LAWS 7077 SELF-MANAGED SUPERANNUATION AND TRUSTS

Credit Points 10

Coordinator Leeanne Hodgson ([https://directory.westernsydney.edu.au/search/name/Leeanne Hodgson/](https://directory.westernsydney.edu.au/search/name/Leeanne%20Hodgson/))

Description This subject equips students with the ability to critically analyse law and policy relating to self-managed superannuation funds and the use of the trust structure, which are essential components for professionals in this area of practice. It provides students with the requisite skills to provide comprehensive financial advice, particularly within the context of an individual being able to choose a superannuation fund or create a self-managed superannuation fund (SMSF). The subject will provide students the opportunity to synthesise areas of law in a practical way that enhances their employability and professionalism.

School Law

Discipline Law, Not Elsewhere Classified.

Student Contribution Band HECS Band 4 10cp

Check your fees via the Fees (https://www.westernsydney.edu.au/currentstudents/current_students/fees/) page.

Level Postgraduate Coursework Level 7 subject

Pre-requisite(s) LAWS 7053 OR LAWS 7010

Incompatible Subjects LAWS 3067

Restrictions

Must be enrolled in a School of Law PG program.

Learning Outcomes

After successful completion of this subject, students will be able to:

1. Apply advanced communication skills in diverse contexts.
2. Synthesise relevant sources of law relating to self-managed superannuation and trusts through accessing, evaluating and using relevant information.
3. Apply theoretical and practical knowledge of self-managed superannuation and trusts to critically analyse and solve complex and novel problems.
4. Critically reflect on the value of ethical conduct as a professional in work and in civic life.

Subject Content

- Introduction to self-managed funds
- Compliance issues
- Investment requirements
- Taxation and superannuation
- Making payments
- Transfer of assets
- Preservation rules
- Estate planning issues
- Financial planning strategies
- Taxation, audit and compliance

- Lump sum benefits
- Advantages/disadvantages of trusts

Assessment

The following table summarises the standard assessment tasks for this subject. Please note this is a guide only. Assessment tasks are regularly updated, where there is a difference your Learning Guide takes precedence.

Type	Length	Percent	Threshold	Individual/Group Task
Participation	Ongoing throughout semester	10	N	Individual
Professional Task	Written component- 1500 words. Oral component- 10 minutes	45	N	Individual
Final Exam	2 hours	45	Y	Individual

Prescribed Texts

- *Australian Superannuation Legislation 2024* (Wolters Kluwer, 30th Edition, 2024)
- Leow, James and Shirley Murphy, *Australian Master Superannuation Guide 2023-2024* (Wolters Kluwer, 27th Edition, 2023-2024)

Teaching Periods

Spring (2024)

Online

Online

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View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=LAWS7077_24-SPR_ON_2#subjects)