

AGM + PROFESSIONAL DEVELOPMENT 23 MAY 2019

The Australian Financial Complaints Authority

AGM FROM
5PM - 5:30PM PRIOR
TO PRESENTATION.
ALL MEMBERS
WELCOME TO
ATTEND

Date:

Thursday 23 May 2019

Time:

4.45pm arrival & registration

5:00pm AGM

5.30pm Presentation start

7pm drinks & canapes

Venue:

The Naval & Military Air Force
Club of SA

111 Hutt Street, Adelaide

Cost:

\$110 Members

\$140 Young professionals (less
than 5 years from graduation)

\$175 Others

CPD:

1 hour

Contact:

Kylie Hender, Secretariat

STEP SA

0417 805 314

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Suzanne's presentations will cover:-

- an overview of the jurisdiction and operation of the recently established Australian Financial Complaints Authority (AFCA);
- how complaints may be made to AFCA and the remedies available to complainants;
- an exploration of superannuation complaints, including changes to the handling of disputes involving death benefits

WHO SHOULD ATTEND?

- Accountants, Financial Planners and Lawyers working with their clients' superannuation funds and benefits
- Professionals dealing with claims for superannuation death benefits

WHAT YOU WILL GAIN

An understanding of what to expect when dealing with AFCA, particularly with relation to disputes concerning superannuation death benefits.

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OUR SPEAKERS

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STEP is the worldwide professional association for those advising families across generations. We promote best practice, professional integrity and education to our members. Our members help families plan for their futures: from drafting a will or advising family businesses, to helping international families and protecting vulnerable family members. Today we have 20,000 Members across 96 countries, and a local Chapter to benefit South Australian professionals. Our members include lawyers, accountants, financial planners and other trust and estate specialists.

Upcoming events:

Tuesday 28 May - Young Professionals, Estate Planning to Protect Assets

Thursday 20 June - Costs in Testamentary Proceedings

Thursday 22 August - Topic TBC

SPEAKERS

Suzanne Mackenzie is a barrister at Bar Chambers specialising in financial services, superannuation, trusts and equity, taxation and general corporate and commercial work. Suzanne was admitted to practice in Victoria in 1990 after graduating from The University of Melbourne with a Bachelor of Laws (with Honours) and a Bachelor of Commerce (where she majored in accounting). Suzanne moved to Adelaide with Mercer Legal in 1994 and signed the South Australian Roll in 1997 when she became a partner of Piper Alderman. In 2002 she founded DMAW Lawyers, together with three partners.

In late 2018, and after almost 30 years of experience as a solicitor, Suzanne joined the independent bar in South Australia. Suzanne has had extensive experience dealing with all kinds of superannuation matters, including superannuation complaints - both from the perspective of the trustee and the member/complainant - and has acted for clients having their matters determined before the Superannuation Complaints Tribunal (being the pre-cursor to the recently established, Australian Financial Complaints Authority). She has also acted on appeals to the Federal Court from the Tribunal.

CHAIR

Julie Van der Velde TEP is Principal of VdV Legal, which she founded in 2016. Julie is admitted in South Australia and the High Court of Australia. Julie specialises in taxation law and business succession issues. With over 20 years' experience working with South Australian businesses Julie brings a practical commercial focus to her advices and works with clients to provide tailored solutions to the complexity of real world issues. She was awarded the Tax Institute's SME Chartered Tax Adviser of the year for 2017 and is co-chair of STEP SA.

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