SUPERCENTRAL

Media release

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28 February 2023

SUPERCentral announces 2023 estate planning course dates

- Estate planning growing area for advisers as money moves across generations; Baby Boomers will pass on an estimated $224 billion p.a. in inheritances by 2050 [1]
- In 2018-19, value of average inheritance was $125,000 compared to $8000 for gifts [2]
- Moving beyond asking clients if they have a Will or not requires specialist expertise; 80% of advisers indicated that wealth transfer provides a significant opportunity – Schroders survey calls it 'the great wealth retention challenge' [3]
- EPAdvantage Estate Planning Program Course Dates: 16 March; 24 August 2023

Online document provider, SuperCentral, continues offering its specialist estate planning course to the advice community with the next online course starting on 16 March.

"We have been pleased with the adviser take-up on these courses and our message of making the planner central to the estate planning process given the surge in monies transferring from baby boomers to their children and grandchildren.

"Usually no one knows the whole of client's affairs as well as the financial planner. With adviser expertise improved on estate and wealth transfer issues, they can be at the centre of the professionals and service providers building the often complex structures for the client," said Peter Townsend, Managing Director at SuperCentral.

"The adviser will have assisted the client in developing an estate plan which may include strategies that are both built into the client's Will (such as tailored testamentary trusts). Plus, strategies outside the Will, such as tailored superannuation death benefit nominations, amending trust deeds and company constitutions, that work together with the other elements of the client's estate plan," said Peter Townsend, Managing Director at SuperCentral.

A strong estate plan is an integral part of a client's financial strategy and provides an important and logical service extension. This course is ideal if you are looking to develop your expertise in Estate Planning and broaden your service offering. It is FPA approved for 18 CPD points.

EP Advantage is a 10-week online program, just 2 hrs per week, focused on delivering practical scenario-based training on estate planning. Online modules are presented by Townsends Lawyers estate planning specialists Brian Hor and Peter Townsend.

Legal expertise is provided by our partner organisation, Townsends Lawyers.

To register for the course: – https://www.supercentral.com.au/epadvantage-course

Or contact course adviser, Shadi, on 02 8296 6266 for more details.

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SUPERCentral is an independent online platform provider of SMSFs, advice, legal documentation and wealth management services to accounting and financial planning firms throughout Australia.

1. https://www.afr.com/policy/economy/baby-boomers-to-pass-on-224b-a-year-by-2050-20211206-p59f7d
2. Productivity Commission https://www.pc.gov.au/research/completed/wealth-transfers/wealth-transfers.pdf
3. Schroders 2022 UK Financial Adviser Annual Survey https://mybrand.schroders.com/m/7370b93744de82d6/original/606092_Schroders-Annual-Adviser-Survey-2022_Adviser-Report_ONLINE.pdf

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