

## **TOA Global joins forces with Smarter SMSF to deliver SMSF foundations course**

### *Partnership marks a first for the Philippines accounting industry*

Outsourced accounting service provider TOA Global is pleased to announce its partnership with Smarter SMSF to deliver a SMSF foundations course that will enable TOA's team members who specialise in the SMSF area, as well as accountants practising in Australia, to build their technical skills and earn CPD credits. The move marks a first for the outsourcing and accounting industry in the Philippines, where TOA's team members are based.

"Aaron Dunn (certified practising accountant and SMSF specialist adviser) has written this course specifically for TOA Global's needs, with the aim of helping our team members be successful in building the technical skills they require," says Nick Sinclair, founder of TOA Global, based on the Gold Coast, Australia. "No other provider in the Philippines has this type of course available for their team members."

TOA Global, the second largest employer of offshore accountants in the Philippines, will provide the course through TOA Global Academy, its training academy. TOA's team members – the employees who work for TOA's clients – will begin taking the course in early 2021.

"The course is made up of six modules, providing a total of 18 CPD hours," says Aaron, CEO and co-founder of Smarter SMSF. "It is available as a standalone course, or alternatively can be accessed as a package along with a series of quarterly SMSF technical updates. We are looking to roll out further training materials for TOA team members in 2021."

Megan Reed, CPO of TOA Global and TOA Global Academy, says there's no doubt skills are the new currency for the 21<sup>st</sup> century.

"In our industry in particular, this couldn't be more true," says Megan. "By enabling our SMSF professionals with this dedicated training and resources, we know that our team are building contemporary and critical skills that will make the biggest impact for our SMSF clients."

The course includes the following modules:

- Introduction to Super and SMSFs
- Investment rules
- Contribution rules
- Pensions and paying benefits
- Taxation of SMSF and member benefits
- Statutory reporting and responsibilities

"This course is not only suitable for TOA team members but is also for local accountants. It serves as a foundations course for any accountant wanting to expand their knowledge and training in the SMSF area," says Nick, who has known Aaron for some time.

"The idea for the course came up when we were both speaking at an event in 2019 and I was talking about how we were wanting to get a course for our TOA team members to help them with their technical skills and take some of this training away from our clients," Nick adds. "I wanted a course that

could be part of their annual training plans. Aaron has written many courses in the past and is one of the most respected and well-known trainers in the SMSF area in Australia.”

Aaron adds, “Both Nick and myself identified an opportunity for Smarter SMSF to partner with TOA to build products that would support existing TOA team members and allow TOA to continue to attract new talent through their market-leading education and development programs.”

The partnership with TOA Global is an important one for Smarter SMSF in that it helps the company play a role in increasing the knowledge and education of TOA staff who are working within the area of self-managed super funds, Aaron says.

“Like any partnership, we see this first opportunity together as something that we can continue to strengthen over time as both businesses continue to grow with additional training and resources to support the growing number of staff working within the SMSF sector,” he says.

For more information please contact:

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#### About TOA Global



Founded in 2014, TOA Global is the fastest growing offshoring business for accountants and bookkeepers in Australia. With more than 1,800 team members, supporting more than 550 accounting firms across the globe, TOA Global has become one of the largest employers of accountants and bookkeepers in the Philippines. With offices located in the Philippines, Australia, U.S.A. and Canada, TOA Global is equipped to support the needs of a diverse global group of accounting and bookkeeping firms looking to grow their teams and scale their practices. By focusing on providing firms with dedicated offshore talent, TOA Global helps address the most common pain points faced by accounting and bookkeeping firms today, including capacity, people, and time.

#### About Smarter SMSF



Smarter SMSF is an industry recognised, award-winning technical education provider in Australia that provides training, support and documents built by active SMSF specialists. Its comprehensive range of

documents and user-friendly platform will guide financial service professionals in creating their documents to make sure they are always accurate, thorough and compliant. Smarter SMSF assists them with its Continuing Professional Development (CPD) learning packages to help them excel in their roles. Financial service professionals rely on Smarter SMSF for expertise on SMSFs and the growth of the sector. The company's insights into technical issues and the SMSF industry means it's regularly asked to participate in government and regulatory reviews.