



## AGENDA

### SUNDAY 17 MARCH

4.30pm–7.30pm	Registration and information desk open
6.00pm–8.00pm	Welcome reception – TSB Bank Arena

### MONDAY 18 MARCH

9.00am–9.15am	CONFERENCE OPENING   Andrew Klein, Conference MC			
9.15am–9.30am	CULTURAL WELCOME			
9.30am–9.50am	WM UPDATE   Michael Venter			
9.50am–10.35am	PREPARING FOR WHAT'S NEXT   Michael McQueen			
10.35am–10.55am	COUNT BUSINESS UPDATE   Michael Spurr, acting General Manager Count Financial			
10.55am–11.25am	MORNING NETWORKING BREAK (including Family Morning Tea)			
11.25am–12.25pm ROUND 1	<p>● <b>Technical</b></p> <p>Technical update Craig Day, Executive Manager Technical Services, FirstTech</p>	<p>● <b>Practice development</b></p> <p>Decoding the millennial mindset – the essential guide to understanding and engaging the next generation Michael McQueen, trend forecaster and six-time best selling author</p>	<p>● <b>Accounting</b></p> <p>Why cloud inventory is the hottest topic among SMEs Sholto Macpherson, editor, DigitalFirst.com</p>	<p>● <b>Research and Investments</b></p> <p>Advice research: updates, evolutions and new additions Brent Bevan, Executive Manager Research</p>
CHANGE OVER				
12.30pm–1.30pm ROUND 2	<p>● <b>Accounting</b></p> <p>Different ways to own property in an SMSF Peter Hogan, Head of Education and Technical, SMSF Association</p>	<p>● <b>Practice development</b></p> <p>Member panel: best practice – business planning, pricing and client engagement insights Sharon McClafferty, Director, Slipstream Coaching Jeff Ebeyer, Executive Manager Practice Development VIC WA SA TAS</p>		<p>● <b>Voyager</b></p> <p>FNA and SOA – the yin and yang! Tom Mackellar, Manager Accounting and Technology Nathan Day, Voyager Coach Count Financial</p>
1.30pm–2.15pm	LUNCH			
2.15pm–3.15pm ROUND 3	<p>● <b>Technical</b></p> <p>Equalising super – why and how? Linda Bruce, Senior Technical Manager, FirstTech</p>	<p>● <b>Research and Investments</b></p> <p>The advice challenge Justine Marquet, Senior Manager, Technical Education Centre of Excellence, AIA Australia</p>	<p>● <b>Accounting</b></p> <p>MYOB, Xero, Intuit – who should you bet on? Let's cut through the hype! Sholto Macpherson, editor, DigitalFirst.com</p>	<p>● <b>Compliance</b></p> <p>The five things you need to know about Best Interests Duty Therese Nguyen, Executive Manager Risk Compliance</p>
CHANGE OVER				
3.20pm–4.10pm ROUND 4	<p>● <b>Compliance</b></p> <p>FASEA – what the changes mean for me and my business John Corcoran, Executive Manager Advice Advocacy</p>	<p>● <b>Accounting</b></p> <p>Referrals: become the complete adviser your clients need you to be Sharon McClafferty, Director, Slipstream Coaching</p>		<p>● <b>Research and Investments</b></p> <p>The earth was flat, now it's round Simon Gresham, Director of Equity – Asia, MFS Investment Management</p>
4.10pm–4.35pm	AFTERNOON NETWORKING BREAK			
4.35pm–5.20pm	CREATING AND MAINTAINING A HIGH PERFORMANCE CULTURE   Gilbert Enoka			
5.20pm–5.30pm	CLOSE   Andrew Klein, Conference MC			
7.00pm–10.00pm	CASUAL NIGHT   TE PAPA MUSEUM   Walking transfers depart TSB Arena at 6.45pm			

## TUESDAY 19 MARCH

7.30am–9.00am	<b>WOMEN IN ADVICE BREAKFAST</b>   Lisa King – Founder & CEO, Eat My Lunch Shed 5, Queens Wharf			
9.10am–9.20am	<b>WELCOME</b>   Andrew Klein, Conference MC			
9.20am–10.10am	<b>A LEGACY OF LEADERSHIP AND RESILIENCE</b>   Helen Clark			
10.10am–10.55am	<b>PANEL SESSION</b>   <b>Australian equities – where to from here?</b> Martin Conlan, Head of Australian Equities, Schroders Paul Taylor, Portfolio Manager, Head of Australian Equities, Fidelity International			
10.55am–11.25am	<b>MORNING NETWORKING BREAK</b>			
11.25am–12.25pm <b>ROUND 5</b>	<ul style="list-style-type: none"> <li>● <b>Technical</b> <b>The importance of keeping things at arm's length</b> Craig Day, Executive Manager Technical Services, FirstTech</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Research and Investments</b> <b>The cost of care – evidence-based insights into the cost of illness and recovery</b> Adam Crabbe, Risk Strategy Specialist, Zurich Financial Services</li> </ul>		<ul style="list-style-type: none"> <li>● <b>Voyager Compliance</b> <b>Supporting you to support your clients. A look at Best Interests Duty</b> John Corcoran, Executive Manager Advice Advocacy Emma Hogan, Senior Manager Xplan Coaching and Training</li> </ul>
12.25pm–1.15pm	<b>LUNCH</b>			
1.15pm–2.15pm <b>ROUND 6</b>	<ul style="list-style-type: none"> <li>● <b>Accounting</b> <b>Business Real Property and funding death benefits</b> Peter Hogan, Head of Education and Technical, SMSF Association</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Research and Investments</b> <b>Aligning goals-based advice and investment implementation</b> Clint Abraham, Portfolio Specialist Peter Burns, Senior Business Development Manager Morningstar Investment Management</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Compliance</b> <b>The disruption of our industry</b> Therese Nguyen, Executive Manager Risk Compliance</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Voyager Compliance</b> <b>Engagement-based pricing – insights from your peers</b> Nathan Day, Voyager Coach Paul Tsikopoulos, Practice Development Manager Count Financial</li> </ul>
<b>CHANGE OVER</b>				
2.20pm–3.20pm <b>ROUND 7</b>	<ul style="list-style-type: none"> <li>● <b>Practice development</b> <b>Everyone's getting engaged!</b> Andrew Klein, Spike Presentations</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Accounting</b> <b>Demand work/life balance: for yourself and of others</b> Sharon McClafferty, Director, Slipstream Coaching</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Research and Investments</b> <b>Why REITs in uncertain (turbulent?) times?</b> Pete Morrissey, CEO Real Estate Securities, APN Group</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Voyager Compliance</b> <b>What you need to know about ongoing service</b> Emma Hogan, Senior Manager Xplan Coaching and Training Therese Nguyen, Executive Manager Risk Compliance</li> </ul>
3.20pm–3.50pm	<b>AFTERNOON NETWORKING BREAK</b>			
3.50pm–4.05pm	<b>ADVISORY COUNCIL UPDATE</b>   Tony Munday, PKF Perth Financial Services			
4.05pm–4.55pm	<b>CONQUERING YOUR MOUNTAINS</b>   Mike Allsop			
4.55pm–5.00pm	<b>CLOSE</b>   Andrew Klein, Conference MC			
	<b>EVENING AT LEISURE</b>   PIE hosted dinners			



## WEDNESDAY 20 MARCH

8.30am–9.30am <b>ROUND 8</b>	<ul style="list-style-type: none"> <li>● <b>Technical</b> Distributing small business CGT exempt proceeds out of a company structure Linda Bruce, Senior Technical Manager, FirstTech</li> </ul>	<ul style="list-style-type: none"> <li>● <b>CountPlus</b> Strategic business planning Matthew Rowe, Chief Executive Officer, CountPlus</li> </ul>		<ul style="list-style-type: none"> <li>● <b>Research and Investments</b> Knowledge café round Session details below</li> </ul>
CHANGE OVER				
9.35am–10.35am <b>ROUND 9</b>		<ul style="list-style-type: none"> <li>● <b>Practice development</b> Re-energising your team through great leadership Karen Gately, Corporate Dojo</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Accounting</b> The company tax rate and dividend franking rules Neil Jones CPA CTA, Director, Tax Banter</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Research and Investments</b> Knowledge café round Session details below</li> </ul>
10.35am– 11.05am	<b>MORNING NETWORKING BREAK</b>			
11.05am–12.05pm <b>ROUND 10</b>	<ul style="list-style-type: none"> <li>● <b>Compliance</b> Better position test Therese Nguyen, Executive Manager Risk Compliance</li> </ul>		<ul style="list-style-type: none"> <li>● <b>Accounting</b> General tax update Neil Jones CPA CTA, Director, Tax Banter</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Research and Investments</b> Knowledge café round Session details below</li> </ul>
CHANGE OVER				
12.10pm–1.10pm <b>ROUND 11</b>	<ul style="list-style-type: none"> <li>● <b>Technical</b> Reversionary pensions vs binding nominations Craig Day, Executive Manager Technical Services, FirstTech</li> </ul>		<ul style="list-style-type: none"> <li>● <b>Accounting</b> The superannuation guarantee amnesty – it's not too late Neil Jones CPA CTA, Director, Tax Banter</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Research and Investments</b> Knowledge café round Session details below</li> </ul>
1.10pm–1.55pm	<b>LUNCH</b>			
1.55pm–2.55pm	<b>MY LIFE STORY – BAND AID AND BEYOND</b>   Sir Bob Geldof			
2.55pm–3.05pm	<b>CONFERENCE CLOSE</b>   Michael Spurr, acting General Manager Count Financial			
7.00pm–11.30pm	<b>AWARDS DINNER</b>   TSB Arena			

## KNOWLEDGE CAFÉS • Research and Investments

8.30am–9.30am <b>ROUND 8</b>	<b>Check, please: group insurance in super – caution and opportunity</b> Daniel Chung, Senior Risk Research Analyst, Advice	<b>The client of tomorrow</b> Andrew Bridgland, Senior Business Development Manager SA/NT, Asteron Life	<b>Navigating FASEA with TAL Risk Academy</b> Dan O'Connor, Sales Development Manager VIC & TAS, TAL	<b>The future of risk advice</b> Kerry Anderson, Senior Strategic Account Manager, ANZ Wealth/OnePath
9.35am–10.35am <b>ROUND 9</b>	<b>Check, please: group insurance in super – caution and opportunity</b> Daniel Chung, Senior Risk Research Analyst, Advice	<b>Lend like a bank</b> Zac Wallis, Strategic Account Manager, Perpetual Investments	<b>How can you and your business be more effective this year?</b> Nick Blue, Regional Manager, BT Financial Group	<b>The millennial generation: insights into their influence on the global economy</b> David Miller, Business Development Manager, Capital Group
11.05am–12.05pm <b>ROUND 10</b>	<b>Digital rising – how will the rise of digital technology affect the future of financial advice?</b> Tony Powell, Strategic Account Manager, Colonial First State	<b>Insurance and estate planning</b> Kyleigh Perkins, National Technical Manager, CommInsure	<b>Infrastructure: dangers of a long cycle and short memories</b> Ben Granbery, National Manager Retail Adam Tweedale, Business Development Manager, Southern Region Lazard Asset Management	<b>Infrastructure – providing some certainty in uncertain times</b> Nathan Ahboo, Regional Manager – QLD and WA, RARE Infrastructure
12.10pm–1.10pm <b>ROUND 11</b>	<b>Managing large orders, bulk orders and ETF trades</b> Ashley Parker, Head of Strategic Accounts, CommSec Adviser Services	<b>Profiting from emerging markets – country selection is key</b> Tim North Ash, Head of Wholesale Sales, Pandal Group	<b>The upside of the downside</b> Dustin Frost, Key Account Manager, Ironbark Asset Management	<b>Sustainable alpha</b> Fawaz Rashid, Key Account & Research Manager, Ausbil