



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	<ul style="list-style-type: none"> ● Technical Technical update Craig Day, Executive Manager Technical Services, FirstTech	<ul style="list-style-type: none"> ● Practice development Decoding the millennial mindset – the essential guide to understanding and engaging the next generation Michael McQueen, trend forecaster and six-time best selling author	<ul style="list-style-type: none"> ● Accounting Why cloud inventory is the hottest topic among SMEs Sholto Macpherson, editor, DigitalFirst.com	<ul style="list-style-type: none"> ● Research and Investments Advice research: updates, evolutions and new additions Brent Bevan, Executive Manager Research
CHANGE OVER				
12.30pm–1.30pm ROUND 2	<ul style="list-style-type: none"> ● Accounting Different ways to own property in an SMSF Peter Hogan, Head of Education and Technical, SMSF Association	<ul style="list-style-type: none"> ● Practice development 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		<ul style="list-style-type: none"> ● Voyager FNA and SOA – the yin and yang! Tom Mackellar, Manager Accounting and Technology Nathan Day, Voyager Coach Count Financial
1.30pm–2.15pm	LUNCH			
2.15pm–3.15pm ROUND 3	<ul style="list-style-type: none"> ● Technical Equalising super – why and how? Linda Bruce, Senior Technical Manager, FirstTech	<ul style="list-style-type: none"> ● Research and Investments The advice challenge Justine Marquet, Senior Manager, Technical Education Centre of Excellence, AIA Australia	<ul style="list-style-type: none"> ● Accounting MYOB, Xero, Intuit – who should you bet on? Let's cut through the hype! Sholto Macpherson, editor, DigitalFirst.com	<ul style="list-style-type: none"> ● Compliance The five things you need to know about Best Interests Duty Therese Nguyen, Executive Manager Risk Compliance
CHANGE OVER				
3.20pm–4.10pm ROUND 4	<ul style="list-style-type: none"> ● Compliance FASEA – what the changes mean for me and my business John Corcoran, Executive Manager Advice Advocacy	<ul style="list-style-type: none"> ● Accounting Referrals: become the complete adviser your clients need you to be Sharon McClafferty, Director, Slipstream Coaching		<ul style="list-style-type: none"> ● Research and Investments The earth was flat, now it's round Simon Gresham, Director of Equity – Asia, MFS Investment Management
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	WOMEN IN ADVICE BREAKFAST Lisa King – Founder & CEO, Eat My Lunch Shed 5, Queens Wharf			
9.10am–9.20am	WELCOME Andrew Klein, Conference MC			
9.20am–10.10am	A LEGACY OF LEADERSHIP AND RESILIENCE Helen Clark			
10.10am–10.55am	PANEL SESSION Australian equities – where to from here? Martin Conlan, Head of Australian Equities, Schroders Paul Taylor, Portfolio Manager, Head of Australian Equities, Fidelity International			
10.55am–11.25am	MORNING NETWORKING BREAK			
11.25am–12.25pm ROUND 5	<ul style="list-style-type: none"> ● Technical The importance of keeping things at arm's length Craig Day, Executive Manager Technical Services, FirstTech	<ul style="list-style-type: none"> ● Research and Investments The cost of care – evidence-based insights into the cost of illness and recovery Adam Crabbe, Risk Strategy Specialist, Zurich Financial Services		<ul style="list-style-type: none"> ● Voyager Compliance Supporting you to support your clients. A look at Best Interests Duty John Corcoran, Executive Manager Advice Advocacy Emma Hogan, Senior Manager Xplan Coaching and Training
12.25pm–1.15pm	LUNCH			
1.15pm–2.15pm ROUND 6	<ul style="list-style-type: none"> ● Accounting Business Real Property and funding death benefits Peter Hogan, Head of Education and Technical, SMSF Association	<ul style="list-style-type: none"> ● Research and Investments Aligning goals-based advice and investment implementation Clint Abraham, Portfolio Specialist Peter Burns, Senior Business Development Manager Morningstar Investment Management	<ul style="list-style-type: none"> ● Compliance The disruption of our industry Therese Nguyen, Executive Manager Risk Compliance	<ul style="list-style-type: none"> ● Voyager Compliance Engagement-based pricing – insights from your peers Nathan Day, Voyager Coach Paul Tsikopoulos, Practice Development Manager Count Financial
CHANGE OVER				
2.20pm–3.20pm ROUND 7	<ul style="list-style-type: none"> ● Practice development Everyone's getting engaged! Andrew Klein, Spike Presentations	<ul style="list-style-type: none"> ● Accounting Demand work/life balance: for yourself and of others Sharon McClafferty, Director, Slipstream Coaching	<ul style="list-style-type: none"> ● Research and Investments Why REITs in uncertain (turbulent?) times? Pete Morrissey, CEO Real Estate Securities, APN Group	<ul style="list-style-type: none"> ● Voyager Compliance What you need to know about ongoing service Emma Hogan, Senior Manager Xplan Coaching and Training Therese Nguyen, Executive Manager Risk Compliance
3.20pm–3.50pm	AFTERNOON NETWORKING BREAK			
3.50pm–4.05pm	ADVISORY COUNCIL UPDATE Tony Munday, PKF Perth Financial Services			
4.05pm–4.55pm	CONQUERING YOUR MOUNTAINS Mike Allsop			
4.55pm–5.00pm	CLOSE Andrew Klein, Conference MC			
	EVENING AT LEISURE PIE hosted dinners			



WEDNESDAY 20 MARCH

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

KNOWLEDGE CAFÉS • Research and Investments

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