CENTREPOINT ALLIANCE

Agenda

Spring Masterclass

8:45 am	**Arrival**
9.00 am	**Welcome**
9:15 am	**Adding value to clients through strategic advice | Centrepoint Alliance** The move to strategic financial planning is gaining momentum amongst financial planners. While investments selection and product recommendations remain at the core of the financial advice proposition, robust advice around strategy can add significant value to a clients' financial well-being as they seek to realise their dreams. This technically-focussed interactive workshop will allow participants to hone their skills in developing strategies for a typical Australian family. Irrespective of your discipline (planner, risk adviser, accountant, lawyer, para-planner or support staff), this session will provide an opportunity to share your knowledge with your peers, and to pick up some new ideas. **Peter Kelly and Mark Teale**
10.45 am	**Morning tea**
11.05am	**A Different Way to Invest | Dimensional** Many investors have unfulfilled expectations. They are looking for a better solution, one that can lead to a better investment experience. What would that approach look like? How can they improve their odds of success? This presentation will answer key questions many investors ask and highlight an alternate, research-based approach to investing. **Tom Fellowes & Carolyn Holmes, QLD** **Jonathon Johnston, WA, NSW** **Paul Turner, SA, VIC**
11.50 am	**Speaker Q & A**
12.05 pm	**Hear from your peers**

Partnering for growth

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12.35 pm	**Lunch**
1.20 pm	**Delivering strategic advice and compliance considerations | Centrepoint Alliance** Professional Standards will explore the compliance issues that may arise from the Technical case study presented by Peter Kelly and Mark Teale. We will look at the advisers obligations to provide documented advice, including the timing and content, and how to ensure you deliver compliant advice that is centred on the best interests of the client. **Justin van der Boog & Wayne Clelland, QLD** **Justin Smith, NSW** **Francisco Ruiz Diaz, WA, SA** **John Fish, VIC**
2.20 pm	**Activity Audit – Find your Genius! | CommInsure** This interactive presentation will empower you to discover what you love to do and delegate, outsource or eliminate everything else leaving you free to operate in your areas of strength. The presentation will focus on: • The three key reasons Business Owners and Advisers are time poor • The first activities left behind in time poor practices • Key principles for gaining control • Practical tools to evaluate what to stop doing, delegate or outsource in your business and find your genius. **CommInsure State Manager**
3.05 pm	**Close**

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