

CHRISTMAS PROFESSIONAL DEVELOPMENT DAY

8:30 am	Arrival
8.45 am	Welcome
8:55 am	<p>The client of tomorrow</p> <p>In this presentation, we look at different generations - from Baby Boomers to Generation Z (born in 1995) and how they think and communicate differently. We discuss the issues facing different generations and suggest possible strategies for them to succeed in an ever-changing world. Finally, we discuss how you can describe and position life insurance to the next generation of clients.</p> <p>Gordon McNaught, Distribution Development Manager Asteron Life Knowledge areas: Life Insurance, General Knowledge</p>
9:45 am	<p>The year that was...</p> <p>In this session, our Professional Standards team will provide an overview of 2018 from a regulatory and compliance perspective. This session will include:</p> <ul style="list-style-type: none"> • Common audit findings • FASEA and education update • Insights from the Royal Commission Interim Report • Key take outs from ASIC's Annual Corporate Plan • Regulatory and Professional Standards update <p>This session is suitable for financial advisers, business principals, paraplanners and support staff.</p> <p>Professional Standards Centrepoint Alliance Knowledge areas: General Knowledge</p>
10:35 am	Morning tea
11:00 am	<p>What is your clients best interest with insurance recommendations?</p> <p>In this presentation, Life Insurance Specialist, David Spiteri, will uncover how workers compensation insurance compares to income protection. This session will also explain some commonly asked questions such as, "Should you recommend the TPD 'Own Occupation' definition or the 'Any Occupation' definition?" and, "What are the differences with income protection policies within superannuation as opposed to non-super?"</p> <p>David Spiteri, Life Insurance Specialist Centrepoint Alliance Knowledge areas: Life Insurance</p>

<p>11:55 pm</p>	<p>DIY Estate Planning</p> <p>This presentation outlines two approaches which enable advisers to discharge their best interest duty regarding estate planning. One approach is to provide a limited insurance-based solution with a referral to an estate planning specialist to complete the service. This presentation will provide practical tips and support materials to enable advisers to deliver this limited service as a starting point. Included is a suggested remuneration model which ensures that clients receive a service in accordance with their needs, and advisers are properly remunerated. Advisers can then determine whether or not they want to progress in providing a comprehensive estate planning facilitation service.</p> <p>National Technical Manager Tal Knowledge areas: Core Insurance, Practice Management, Specialist Insurance</p>
<p>12:45 pm</p>	<p>Partnering for growth in the new world of advice</p> <p>At the FY18 full-year Financial Results, Centrepoint announced a strategic refresh for the organisation.</p> <p>During this session, a member of Centrepoint's executive team will provide an update on Centrepoint's journey to date, and how we're tracking to the deliverables we committed to.</p> <p>We'll outline Centrepoint's vision for our advice community and how we intend to support our advisers to transition to the new world of advice. We'll share insights into our revamped business model and service offering and provide a demonstration of the new technology being developed to support advice firms.</p> <p>Centrepoint Alliance</p>
<p>1.35 pm</p>	<p>Christmas lunch and drinks</p>