

# MAY VIRTUAL MASTERCLASS

## TUESDAY AGENDA | 15 MAY

<b>9.00am-9.50am</b>	<p><b>Investing for Income</b></p> <p>We are seeing a structural shift in investor objectives as the bulk of Australia's wealth is moving from an accumulation / growth desire, to a decumulation / income need. This comes at a time as cash, term deposits, and bond yields are at record lows. This webinar will explore a framework to various ways of managing portfolios to generate income whilst managing risk.</p> <p>Join the conversation on building income enhanced portfolios.</p> <p><b>Doug Hew, Kaplan Funds Management</b></p>
<b>9.50am-10.05am</b>	<b>Break</b>
<b>10.05am-10.55am</b>	<p><b>Tech Tip and Budget Overview</b></p> <p>Incorporating our regular Quarterly Tech Tips webinar, this session will look at recent developments in the superannuation, SMSF and Income Support space, including the new superannuation initiatives coming to effect from 1 July 2018, particularly downsizer contribution rules, and the ability to carry forward the unused portion of the concessional contribution cap'. With the budget being delivered only a few days prior to the May Virtual Masterclass, we will provide a comprehensive overview of any proposed new initiatives which could affect your clients and business.</p> <p><b>Peter Kelly and Mark Teale, Centrepont Alliance</b> Knowledge areas: Superannuation, SMSF</p>
<b>10.55am-11.10am</b>	<b>Break</b>
<b>11.10am-12.00pm</b>	<p><b>Snakes and ladders - Insurance in Super post 1 July 2017</b></p> <p>In this session, we examine in detail the changes through an insurance lens - exploring, through the use of case studies, the good and the bad of how the measures will affect the risk advice you provide. We will also deep dive into the taxation of superannuation benefits, and consider a range of strategies you can employ to navigate successfully through the danger spots.</p> <p><b>Katherine Ashby, BT Financial Group</b> Knowledge areas: Superannuation, Life Insurance</p>
<b>12.00pm-12.45pm</b>	<b>Break</b>
<b>12.45pm-1.35pm</b>	<p><b>Change in Government and so many other changes...</b></p> <p>The opinion polls suggest that at the next Federal election we will be getting a new Labor Government, and with this massive changes to the tax system. Limited negative gearing deductions, a smaller CGT discount, no refundable imputation credits, a minimum 30% tax on discretionary trust distributions, limited deductions for the cost of managing your tax affairs, less companies getting the 27.5% tax rate, increasing the highest marginal tax rate to 49%...</p>

	<p>So as long as we don't advise individuals, companies or trusts, and as long as our clients don't own capital assets, don't use debt, don't get franked dividends and don't get trust distributions then we don't need to consider what these changes will be (sarcasm!).</p> <p>In this session we will consider the effect of each of these announcements. And if we have time we will look at any other changes that are on the horizon.</p> <p><b>Ken Mansell, Tax Rambling</b> <b>Knowledge areas: Taxation</b></p>
<p>1.35pm- 1.50pm</p>	<p><b>Break</b></p>
<p>1.50pm- 2.40pm</p>	<p><b>Recap with Bill Webster</b></p> <p>As the recent round of Masterclasses came to a close and we reviewed the feedback, Bill Webster was the roaring national favourite. Today we invite him back to re-cap on his presentation based on the points you enjoyed most.</p> <p>During Bill's re-cap we will look at what you have implemented since March, share any ideas, successes or challenges you may have had with them, and the difference they have made to your activities during that time.</p> <p>To make it even more interactive, you will have the chance to ask any questions around any of the ideas Bill shared with you during the March Masterclass and any challenges that you may have faced with their implementation.</p> <p>Join us for a truly rewarding and interactive session with Bill Webster, proudly brought to you by Zurich.</p> <p><b>Bill Webster, Zurich</b> <b>Knowledge areas: Generic Knowledge</b></p>
<p>2.40pm- 2.55pm</p>	<p><b>Break</b></p>
<p>2.55pm- 3.45pm</p>	<p><b>Economy 2018: Moving up a gear?</b></p> <p>The global economy is in good shape. The Australian economy is gathering momentum. So what does this mean for our interest rates, the dollar and shares? Craig will highlight the key issues and the implications for local businesses and clients.</p> <p><b>Craig James, Colonial First State</b> <b>Knowledge areas: Managed Investments, Securities</b></p>
<p>3.45pm</p>	<p><b>Close</b></p>

\*Note that the knowledge areas are an estimate only.