

Christmas Masterclass

Agenda

SUNSHINE COAST

Date	Thursday, 26 November 2020
Venue	Mooloolaba Surf Club 'Events Room' The Esplanade MOOLOOLABA QLD 4557
Contact	Events@cpal.com.au

8:30 am	Arrival
8:45 am	Welcome
8:50 am (90 min)	<p>Managing SMSFs in the sunset years</p> <p>There are approximately 400,000 people aged 65 and older with an SMSF.</p> <p>When it comes to managing the financial plans of clients in their golden age, superannuation in general, and SMSFs more specifically, need careful consideration. Issues including the loss of capacity, appointing guardians, accessing government benefits, meeting aged care needs, and the eventuality of paying death benefits, cannot be ignored.</p> <p>Join us as we unpack the myriad of challenges to consider for those clients in advancing years.</p> <p>Presenters: Peter Kelly, National Technical Manager, Centrepoint Alliance & Mark Teale, National Technical Manager, Centrepoint Alliance</p> <p>FASEA CPD areas: Technical Competence</p> <p>Topic area: Superannuation, SMSF, Social Security & Aged Care</p>
10:20 am	Morning tea

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10:50 am (1hr)	<p>2020: Reflections on the regulatory landscape</p> <p>It's been a challenging year for many reasons, including the changing regulatory environment. In this session, the Professional Standards team take a look at some of the changes and key learnings from:</p> <ul style="list-style-type: none"> • Common audit findings • Code of Ethics • Royal Commission • Cybersecurity • Regulatory changes <p>As we take stock of where we've come from and what's ahead, be prepared for some fun and a bit of friendly competition.</p> <p>Presenters: Justin van den Boog, Head of Professional Standards and Jane Mulvihill, Senior Professional Standards Consultant, Centrepoint Alliance</p> <p>FASEA CPD areas: Regulatory Compliance & Consumer Protection Topic area: Generic Knowledge, Financial Planning</p>
11:50 am (45 min)	<p>Thoughts on the new year: Research and Economic update</p> <p>In this session, Centrepoint Alliance new Head of Research, Daniel Stojanovski, will provide an overview of the current economic outlook and introduce you to some upcoming programs that the research team are working on including:</p> <ul style="list-style-type: none"> • 2021 Research schedule and the planned 2021 SAA review • New search capability for the APL • Portfolio Construction overview <p>Presenter: Daniel Stojanovski, Head of Research, Centrepoint Alliance</p> <p>FASEA CPD areas: General Topic area: Generic Knowledge</p>
12.35 pm	Christmas lunch and drinks