

## CHRISTMAS MASTERCLASS

8:30 am	Arrival
8:45 am	Welcome
8:50 am	<p><b>Macro, markets and model portfolio positioning</b></p> <p>The Centrepont Research team will provide an update on the current environment and outlook for the major global economies and financial markets. The team will provide guidance on the characteristics of traditional asset classes likely to affect their performance in different market environments and make recommendations on appropriate investment styles and portfolio positioning for clients, given the current outlook and valuation levels.</p> <p><b>Miriam Herold, Head of Research and John Stamatopoulos, Senior Research Analyst</b> Centrepont Alliance <i>CPD areas: General</i></p>
9:50 am	<p><b>Regulatory Update</b></p> <p><b>Justin Van Den Boog, Head of Professional Standards</b> Centrepont Alliance <i>CPD areas: Regulatory compliance and consumer protection</i></p>
10:05 am	<p><b>Industry Update</b></p> <p><b>David Spiteri, Life Insurance Specialist</b> Centrepont Alliance <i>CPD areas: Technical competence, General</i></p>
10:20 am	<p><b>Case Study: Do you have a leaky boat? The next steps to Safe Harbour</b></p> <p>Following on from the success of the July Masterclass, this Masterclass will see the combination of our Insurance Specialist (David Spiteri) and Professional Standards teams in a two-part interactive case study. The sessions will focus on the next steps of demonstrating Best Interests Duty and the safe harbour requirements for your practice. We will identify the key aspects of the advice experience, from the initial fact finding, through to insurance needs analysis, finding the right products and finally how to demonstrate this through appropriate product replacement. While we will be focusing on insurance, we will discuss how to apply these concepts to other advice areas, including superannuation.</p> <p><b>Justin Van Den Boog, Head of Professional Standards and David Spiteri, Life Insurance Specialist</b> Centrepont Alliance <i>CPD areas: Technical competence, Client care and practice, Regulatory compliance</i></p>
10:40 am	Morning tea

11:00 am	<b>Case Study</b> <i>continued</i>  Justin Van Den Boog, Head of Professional Standards and David Spiteri, Life Insurance Specialist Centrepont Alliance <i>CPD areas: Technical competence, Client care and practice, Regulatory compliance</i>
12:20 pm	<b>FASEA Exam Adviser Experience</b>  Hear from you peers about their experience and how they prepared for the FASEA exam.  <b>Hosted by Business Consultant, Centrepont Alliance</b>
12:40 pm	<b>Partnering for growth in the new world of advice</b>  During this session, Angus will provide an update on Centrepont Alliance and our adviser community.  <b>Angus Benbow, Chief Executive Officer Centrepont Alliance</b>
1.30 pm	<b>Christmas lunch and drinks</b>