CENTREPOINT ALLIANCE

Agenda

Christmas Professional Development Day

Date	Thursday, 24 November 2016
Venue	RACV Royal Pines Ross Street Benowa, QLD, 4214
Contact	Lisa Wells | 07 5574 0244 | Events@cpal.com.au

8:45 am	**Arrival**
9.00 am	**Welcome**
9:05 am	**The changing face of the insurance client?** In a new world where the winners will be those that can better connect with consumers, life insurance advice will need to yet again transform to meet the growing demands of a connected client. This session brings to life key consumer trends and how these pertain to life insurance, and examines how adviser businesses can better respond to a client demand: • More value and greater convenience. How do you use existing and new technologies to streamline your advice process, reward loyalty and provide more than just risk insurance advice? • Personalisation. Templates and broadcast newsletters will not be enough to maintain connection with your existing clients. How do you maintain ongoing personalised service when you have hundreds or thousands of clients? Life insurance advice is in the verge of change and it is being driven by the consumer. How prepared are you for the client of the future? **MLC**
9:55 am	**Strategies for clients 5 years from retirement** This session looks at various strategies clients could consider implementing in the last 5 years before retirement to reduce debt and maximise their retirement income. The focus is on: • identifying the issues facing clients in their final 5 years before retirement • understanding and implementing strategies to maximise superannuation benefits; optimise Centrelink entitlements and reduce debt **Colonial First State**
10.45 am	**Morning tea**
11:05 am	**Flexible Remuneration: The Choice is Yours**

Agenda

	This presentation will challenge traditional thinking about how advisers can be remunerated for risk advice. It will showcase how insurers are adapting product design to give advisers and their clients more choice, flexibility and control. Through Asteron Life's remuneration modeller you will be able to get a clear understanding of the short and long term impacts of proposed commission structures. We will share strategies on how you can help mitigate impacts. The key takeaway from this presentation will be practical cases studies which focus on outcomes that can be implemented in your business immediately. **Asteron Life**
11:55 am	**The idea exchange | Leading the way together!** During this session we would like you to bring one idea that you have successfully implemented into your practice in 2016. Each adviser, accountant and support staff will have 5 minutes to present this idea to the peers on their table. The table as a collective will nominate their favourite idea conferred and the chosen person will present their idea to the audience. **All advisers, accountants and support staff**
12:55 am	**Closing remarks** **Centrepoint Alliance**
1.00 pm	**Close and Christmas celebrations**