CENTREPOINT ALLIANCE

Agenda

Christmas Professional Development Day

Date	Wednesday, 14 December 2016
Venue	Mercure Townsville Woolcock Street TOWNSVILLE QLD 4810
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? **Matt Venus | MLC**
9:55 am	**SMSFs revisited** Topics to be covered will include the following: • LRBAs – update on the safe harbour terms and non-arm's length income • Reserves • Budget measures – implications for SMSFs of the $1.6m transfer balance cap **Peter Kelly**
10.45 am	**Morning tea**

11:05 am	**Flexible Remuneration: The Choice is Yours** 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. **Trish Wilson | Asteron Life**
11:55 am	**SMSF advice in the new landscape** July 1st 2016 saw the removal of the accountants exemption in relation to provision of SMSF advice. This change has impacted the SMSF landscape and caused many accountants to review their business processes in relation to SMSF services. This presentation will review the changes and what they mean to accountants, provide insight into the various ways we are seeing accountants approach the change, and look at the delineation between personal and general advice from an accountants perspective. **Simon Backman, Centrepoint Alliance**
12:35 pm	**Closing remarks** **Centrepoint Alliance**
12.40 pm	**Close and Christmas celebrations**