

JULY MASTERCLASS

8:30 am	Arrival
8:45 am	Welcome
9:00 am	<p>How to effectively engage your clients in the estate planning process and discover new opportunities to increase the underlying revenue to your business</p> <p>Many people don't realise the importance of having an up to date Will and estate plan and the consequences for your family and estate if you don't.</p> <p>This practical and highly interactive seminar is delivered on a whiteboard and takes the audience through a live case study that shows:</p> <ul style="list-style-type: none"> • why you should have a Will and what you should include in a modern day Will; • what happens if you die without a Will; and • dangers of Will Kits. <p>The seminar will also work through a raft of estate planning tips and tricks encompassing options and solutions to show how proper estate planning can:</p> <ul style="list-style-type: none"> • limit legal claims and obtain taxation efficiency; • make provisions for vulnerable and/or at-risk beneficiaries; • pass wealth on death securely to intended beneficiaries; and • make provision for the prospect of future mental incapacity. <p>The session will show how you as an adviser can incorporate estate planning as an integral part of your value proposition. Attendees will leave with a wealth of estate planning tips and tricks and a solid understanding of how they can effectively engage clients in the estate planning process.</p> <p>Ravi Malhotra, Head of AET Business Development, IOOF Knowledge areas: Estate Planning</p>
9:50 am	<p>Learnings from the Royal Commission...</p> <p>The Royal Commission investigation into Misconduct in the Banking, Superannuation and Financial Services Industry has highlighted a number of concerns across the industry.</p> <p>Due to the current financial services storm of disruption, it is now, more than ever, important to ensure that our communities come together and continue to lead and build the best financial services industry of the future.</p> <p>This session will review some of the more relevant cases that were highlighted during the Royal Commission and will provide advisers and licensees with suggested actions, including a useful checklist to help prevent similar instances in the future. Focusing on fee for no service, breach reporting and ethical behaviour, this presentation will ensure that your advice firm is meeting industry standards at this crucial time.</p> <p>Professional Standards, Centrepoint Alliance Knowledge areas: Ethics, Practice Management</p>

10:40 am	Morning tea
11:05 am	<p>Superannuation and Social Security – something old and something new!</p> <p>This session is designed to answer the questions you have always wanted to have the answers to. Mark and Peter will explore, through commentary and a series of small case studies and worked examples:</p> <ul style="list-style-type: none">• How private companies and trusts are handled by Centrelink and the DVA;• Downsizer contributions – how they work and who they suit;• Death benefits paid from industry and APRA regulated funds – what our research has revealed so far;• The pension loans scheme and how it might benefit your clients. <p>Peter Kelly and Mark Teale, Centrepoint Alliance Knowledge areas: Superannuation, Social Security, Estate Planning</p>
1.05 pm to 3:00 pm	End of financial year lunch and drinks