

MARCH MASTERCLASS

8:15 am	Arrival
8:30 am	Welcome
8:45 am	<p>Why Content matters and Regular Communication is vital; insights from a financial content provider</p> <p>Regardless of whether you use social media or not, even if you struggle to put together a quarterly newsletter – you will learn some great insights on content and client communication. The benefits for the client and the practice.</p> <p>Rob will explore the need for engaging online financial content. It's a necessity to stay top of mind in this digital age, what are the challenges facing advice practices. How you can stand out and make content part of your client value proposition, to aid in charging fees and as a client retention and attraction strategy.</p> <p>Rob will share the main lessons that they have learnt from building, producing and monitoring online financial content. Importantly, what do people value in content – hint, everybody is different. You will learn to cater for client's values even when you may not know them!</p> <p>Rob will provide practical examples of how can you use a content platform as part of the initial client process, with current clients and to generate referrals. Also, how you can you use such a resource for marketing initiatives and with Centres of Influence.</p> <p>Rob's aim is to pass on practical points that can make a difference to your advice practice. Rob will provide a quick overview of the IRESS financial education and engagement resource. He will share the statistics of how the end client is interacting with financial content on a regular basis.</p> <p>Robert Skinner IRESS Knowledge areas: Practice Management</p>
9:15 am	<p>An extra blanket, or a few months in Tuscany – what is 'comfortable'?</p> <p>When seeking financial advice, many Baby Boomers and older Gen X clients will state at least one of their goals is to enjoy a 'comfortable retirement'.</p> <p>But comfortable means different things to different people.</p> <p>For one, comfortable will be having enough blankets on the bed to keep warm in winter, yet for another, comfortable will be spending three months of our southern winter in Tuscany.</p> <p>All too often, when the goal of a 'comfortable retirement' raises its head, it is often glossed over without due attention being paid to understanding exactly what it means for each client. And in many cases, whether the client's idea of a comfortable retirement is even achievable.</p>

Providing advice to clients entering the second half of life presents a host of challenges however it can be fulfilling and rewarding for the adviser willing to embrace those challenges.

However, there will be some uncomfortable conversations, particularly when clients have goals that are unrealistic, they are unwilling to compromise, or when life deals a blow (e.g. death, illness, job loss, business failure, relationship breakdown, and family obligations), and 'Plan B' needs to be implemented.

In this session you will be invited to unpack a number of issues surrounding the provision of advice for this demographic, including superannuation, retirement planning, insurance, investments, and delivering compliant advice.

Australia's Baby Boomers number around 5.6 million, and with Gen X adding another 6.5 million to the total, the need for pre and post retirement advice has never been greater.

Being case study based, this session will equip you with information, tools and strategies to enhance your service delivery to this vital market.

Peter Kelly and Mark Teale
Centrepont Alliance

Knowledge areas: Superannuation, Social Security/Veterans Affairs, Insurance

10:45 am Morning tea

Are you prepared for the regulatory changes ahead?

During this session the Professional Standards team will be explore a range of topics including:

- Privacy changes
- Education standards for financial advisers
- Client reviews
- Conflicts of interest
- Lessons from ASIC's example Insurance SOA

11:05 am

Ensuring your firm is up to date and prepared for the 2018 regulatory changes - Helping you to mitigate risk.

Professional Standards
Centrepont Alliance

Knowledge areas: Generic Knowledge, Financial Planning

Managed Accounts – transformational or just another platform feature?

Managed Accounts are currently one of the most publicised and fastest growing solutions in the financial services market.

11:55 am

Will this industry trend continue? Are Managed Accounts relevant to all advice firm clients? Are they truly transformational or just another platform feature?

This session will explore each of these issues and what it means potentially for advice firms and their client experience.

Learning outcomes:

- Current and future industry trends for Managed Accounts
- Why Managed Accounts and traditional wrap platforms are different animals
- Intergenerational wealth transfer and associated client engagement challenges
- How Managed Accounts can be business transformational and enable engagement with a broader range of clients
- Future direction of Managed Account features

Mat Walker

Head of Product & Marketing Praemium

Knowledge areas: Managed Accounts, Industry Trends, Client Engagement

Ideas Worth Implementing

In this session, Bill Webster will take you on a client engagement learning experience gained from 36 years as an adviser. He will introduce you to concepts that are incredibly easy to implement, but can make a massive difference to the client engagement experiences you will have in the future and the results that you will get from them.

In this ideas-packed, inspiring session, Bill will share with you a wide variety of concepts including:

- 4 key words that sit at the 'heart' of client engagement
- The power of meaningful questions, that will make a difference
- The importance of understanding and articulating your WHY you do what you do
- The relationship between value and price
- The power of compassionate service at claim time

One of Bill's favourite sayings is;

The life of an adviser wasn't meant to be easy but it was meant to be worth it
Bill looks forward to sharing his ideas with you!

Bill Webster

Client Engagement Experience

Knowledge areas: Practice Management, Generic Knowledge

12:45 pm

1.35 pm Lunch