

MARCH MASTERCLASS

8:45 am	Arrival
9:00 am	Welcome
9:05 am	<p>Panel Discussion: Insights and outlook on financial markets and macroeconomics</p> <p>The Centrepont Alliance Research team will be joined by investment experts from three diverse and highly regarded investment managers for a panel discussion covering topical issues in financial markets, macroeconomics, geopolitics and investment product trends.</p> <p>Questions from the audience are highly encouraged, so come prepared with areas where you would like to gain unique insights from this panel of investment professionals.</p> <p>Miriam Herold, Head of Research and John Stamatopoulos, Senior Research Analyst Centrepont Alliance Knowledge areas: Generic Knowledge, Securities, Managed Investments, Fixed Interest</p>
9:55 am	<p>You know Best Interests Duty, right.....?</p> <p>In this session our Professional Standards team will cover two topics:</p> <ol style="list-style-type: none"> 1. Revisit Best Interest Duty, the Safe Harbour Steps and Appropriate Advice obligations, and look at how ASIC assess compliance with BID when conducting audits. This session will assist advisers and their staff to better understand how to meet these obligations, and help licensees and compliance staff to conduct more effective audits. 2. Provide an update from the Royal Commission and how it applies to your firm. <p>Professional Standards Centrepont Alliance Knowledge areas: Generic Knowledge, Financial Planning</p>
10:45 am	Morning tea
11:10 am	<p>The Return of the Case Study!</p> <p>The legislation associated with Superannuation, Age Pension and Aged Care can be complex, hard to understand and if you are not exposed to the issues on a regular basis, not easy to retain and remember. Applying the legislation to real-life situations has been proven to be an effective method of learning and retaining information. It is for this reason that Peter and Mark have decided to bring back the case study.</p> <p>Peter will present several real-life superannuation related scenarios giving you the opportunity to consider each situation, and craft suitable advice.</p> <p>In the second half of the allotted time, Mark will follow a typical aged couple through the trauma associated with entry to aged care, the costs and the effect on their age pension entitlement. This scenario will again be presented via a series of questions looking for your input.</p> <p>So be prepared - this 90-minute session will require you to work, think about the various situations provide feedback and to listen and learn.</p> <p>Peter Kelly and Mark Teale, Retirement Strategies and Solutions Centrepont Alliance</p>

	Knowledge areas: Superannuation, Aged Care, Age Pension
12:40 pm	Partnering in the new world of advice During this session, Angus will provide an update on Centrepoint's strategy and new advice offering. He will also demonstrate some of the areas we have been working on to support our partnership with our Advice Community. He will also discuss the findings from the Royal Commission and our early views on the impact to the industry and the opportunities for Centrepoint and our advisers. Angus Benbow, Chief Executive Officer Centrepoint Alliance
1.30 pm	Close and lunch