CENTREPOINT ALLIANCE

Agenda

CENTREPOINT ALLIANCE RISK ROADSHOW AGENDA

8.45 am	**Arrival Tea and Coffee**
9.00 am	**Welcome and opening | David Spiteri**
9.15 am	**The Advice Challenge** AIA in conjunction with the Beddoes Institute undertook research to uncover what clients want, and value. This session challenges advisers to honestly answer 'are we delivering value?' and provides easy to implement solutions. **Matt Wakefield | AIA** **Knowledge Area: Financial Planning, Insurance**
10.00 am	**Getting your Business Financially Fit** This presentation outlines the specific elements of a financial health check, and then provides a practical methodology for implementing appropriate financial control measures. This implementation is critical in the creation of a strong and viable advising business. **David Glenn | TAL** **Knowledge Area: Insurance, Practice Management**
10.45 am	**Morning tea**
11.00 am	**Strengthening the Estate Planning and Advice Nexus** Estate planning is not new to advice, but using estate planning as a key differentiator may introduce a new way of thinking for your business/advice. Complexities of blended families, even the testing of Best Interests Duty in the Federal Court recently, should be seen as opportunities that now exist to see a renewed focus in estate planning not as an ancillary consideration but as a key strength in the provision of advice in your business. Today, we aim to shift thinking in estate planning form the obligation lens of the regulator to an opportunity to strengthen and link your advice and ultimately, the revenue in your practice. **Adam Crabbe | Zurich** **Knowledge Area: Insurance, Practice Management**
11.45 am	**Close**