

CENTREPOINT ALLIANCE RISK ROADSHOW AGENDA

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| 8.45 am | Arrival Tea and Coffee |
| 9.00 am | Welcome and opening David Spiteri |
| 9.15 am | <p>Insurance trends and the case for change</p> <p>ANZ recently published a white paper on Life insurance trends and the case for change. In this session, Mark Neil will focus on two of the key findings:</p> <ol style="list-style-type: none"> 1. Pricing pressure - including a strong focus on sustainability, product development, the impact and how risk advice is changing. 2. Public trust – focusing on how the industry can rebuild trust, including the future of risk advice and how using best interest duty, we can continue our journey to professionalism. <p>Finally, Mark will explore some ideas on how you can adapt and thrive into the future.</p> <p>Mark Neil OnePath</p> |
| 10.00 am | <p>The Front End of an Insurance Process</p> <p>Implementing your insurance recommendations is a critical part of your overall advice strategy. However, it can be perceived as being complex and onerous causing frustration to you and your clients.</p> <p>This session aims to help you simplify this process by following some simple strategies that enable you to:</p> <ul style="list-style-type: none"> • Implement the insurance as quickly as possible • Strengthen your relationship with the client • Realise revenue gains through higher conversion rates and improved productivity (less time chasing the application) <p>Sheldon will cover the e2e process from Advice to implementation with focus on integrating our (adviser and underwriting) efforts for an optimal client experience.</p> <p>Sheldon Hatzantonis BT Life</p> |
| 10.45 am | Morning tea |

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| 11.00 am | <p>What Advisers need to know about Duty of Disclosure</p> <p>An important role of Financial Advisers is to inform their clients about their obligations to disclose certain matters to the insurer before a contract of insurance is entered into. There are potentially serious implications for both the Insured and the Financial Adviser if the insured fails to do so. This presentation uses a legal case and examples to explain:</p> <ul style="list-style-type: none">• What the Duty of Disclosure means for Advisers when writing insurance• The Claims assessment process and how disclosure is verified• The difference between Non-Disclosure, Misrepresentation and Fraud and what remedies are available to the Insurer to apply under the Insurance Contracts Act <p>Ann-Maree Lynch Asteron Life</p> |
| 11.45 am | Close |
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