RI advice
RI Advice Group Pty Ltd

Professional Development Day Agenda

Day 1

Time		
8.00am – 8.20am	Registration & Coffee	
8.20am – 8.30am	**Welcome** Regional Practice Manager	
8.30am – 9.00am	**RI CEO Update** Darren Whereat	
9.00am – 10.00am	**Economic Update** James Blair - Fixed Income Investment Specialist *Executive Director UBS* James is a senior member of the Global Fixed Income capability management team, with specific responsibility for Asia Pacific. James is responsible for communicating the firm's fixed income investment strategies to clients and consultants, as well as identifying and developing fixed income solutions for clients.	
10.00am – 10.15am	***Morning break***	
10.15am – 11.15am	**What's the score?** Jason Gapps / Jodie Hansen (Brisbane) *Head of Aligned Licensees Practice Management* What does a good financial planning practice look like? Revisit the key metrics for success and develop a plan for your team & business.	
11.15am – 12.15pm	**Strategies for 2013/14** Senior Technical Manager - Colonial First State Ensure you can provide the best technical strategies to your clients in 2013/2014. A wrap up of the technical strategies that you can target with your clients during 2013/14, with two main themes: • Legislative and technical change during 2013 affecting clients' personal tax and super contribution strategies • Recommending technical strategies in a time of uncertainty and understanding potential new and updated existing technical strategies	
12.15pm – 1.00pm	***Lunch***	
1.00pm – 1.45pm	**Breakout 1 – New Client Acquisition in a jaded consumer world** Liz Hooper, Marketing Manager Joncarl La Rosa, Senior Manager Understand the current threats to your business, the strategies that can help you to tap into the next generation of clients, and how the available RI marketing can support you.	**Breakout 1 – Superannuation Challenge** Stephen Bone / Mark Gleeson (Melbourne) *OnePath Technical Services* Identify and apply key superannuation rules and apply superannuation strategies to client needs and objectives
1.45pm – 2.30pm	**Breakout 2 – Superannuation Challenge** Stephen Bone / Mark Gleeson (Melbourne) *OnePath Technical Services*	**Breakout 2 - New Client Acquisition in a jaded consumer world** Liz Hooper, Marketing Manager Joncarl La Rosa, Senior Manager
2.30pm – 2.45pm	***Afternoon Break & Networking Session***	
2.45pm – 4.00pm	**Chief Investment Office - Model Portfolio Review** Jason Coggins *Managed Funds Research Manager* • Managed Funds Model Portfolio construction • Direct Equity support • Approved List Update	
4.00pm – 6.00pm	**Proprietors session**	

Speakers & Session times subject to change

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Day 2

Time		
8.50am – 9.00am	**Day two Welcome** Regional Practice Manager	
9.00am – 9.40am	**Adviser Panel – FOFA in practice** Facilitated by Regional Practice Manager Hear from fellow advisers about how they have managed the transition of FOFA into their own business	
9.40am – 10.30am	**Scaled advice – the next frontier?** Adrian Kwa, Head of Aligned Licensees Risk/ Stephen Blood, Head of Advice Compliance (Melbourne) Delivering advice and ongoing service in a simple cost effective way	
10.30am – 10.45am	***Morning break***	
10.45am – 11.45am	**Breakout 1 – Insurance Inside or Outside of Super** Stephen Bone / Mark Gleeson (Melbourne) *OnePath Technical Services* Articulate the benefits and risk associated with insurance inside superannuation for Life, TPD, Income Protection and Trauma Insurance policies.	**Breakout 1 – Chant West: Supporting Best Interests** Leo Mauceri/ David Blunt (Perth) *Insurance, Annuities, Platform Research Manager* Participants will become familiar with navigating through the Chant West website to access the switching tools, and gain understanding on how the switching tools can ensure efficient and compliant product research.
11.45am – 12.45am	**Breakout 2 –Chant West: Supporting Best Interests** Leo Mauceri/ David Blunt (Perth) *Insurance, Annuities, Platform Research Manager*	**Breakout 2 – Insurance Inside or Outside of Super** Stephen Bone / Mark Gleeson (Melbourne) *OnePath Technical Services*
12.45pm – 1.15pm	***Lunch***	
1.15pm – 2.00pm	**It's all about you – training and development in 2014** Helen Blackford *Head of Adviser Development*	
2.00pm – 2.55pm	**Surviving the Storm** Peter Davidson This presentation is a personal account of what David and his team were confronted with in the 98 Sydney to Hobart yacht race in what's been described as one of the worst maritime disasters in ocean racing history; dealing with a grade 5 Hurricane. It's about working as a team, performing under high pressure situations, adapting to your environment, relying on your training and your team, dealing with your fears and doubts, trust, failure and success.	
2.55pm – 3.00pm	**Wrap up and close** Regional Practice Manager	
3.00pm	***Close***	