VISION

afa

AFA Virtual Conference Program

2020

14-15 Oct Program
available now On-Demand

AFA Virtual Conference VISION
Wed 14 – Thu 15 October

LIVE Program for Wed 14 October - NOW AVAILABLE ON PLAYBACK

9:00am

MC Welcome
Live

Nigel Collin, Master of Ceremonies

9:10am

AFA CEO Address
Live

Phil Kewin, CEO, AFA

9:30am

Assistant Minister Address
Live Q & A

Senator the Hon Jane Hume, Assistant Minister for Superannuation, Financial Services and Financial Technology, Australian Government

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10:10am Break

10:25am

Regulators Panel
Live Panel Q&A

Aleks Vickovich, Wealth Editor, Australian Financial Review
Facilitator

Natalie Cameron, Lead Ombudsman - Investments & Advice, Australian Financial Complaints Authority

Stephen Glenfield, Chief Executive Officer, Financial Adviser Standards and Ethics Authority Limited (FASEA)

Kate Metz, Senior Executive Leader, Financial Advisers, ASIC

11:30am

Policy Outlook
Live

Phil Anderson, General Manager Policy and Professionalism, AFA

12:00pm

Interactive Audience Session
Live

Nigel Collin, Master of Ceremonies

12:00pm

Choose UR Own
Virtual Exhibition & Lunch

LIVE Program for Wed 14 October - NOW AVAILABLE ON PLAYBACK

12:35pm

Economics Panel
Live Q & A

Julia Newbould, Editor At Large, Money Magazine Australia
Facilitator

Bob Cunneen, Senior Economist and Portfolio Specialist, MLC

Brian Parker, Chief Economist, Sunsuper

Matt Wacher, Chief Investment Officer, Morningstar

1:40pm

Goals-Based Risk: A Better Approach to Managing Client Risk Preferences
Live from the USA

Ryan Murphy, Head of Decision Sciences, Morningstar Investment Management

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2:30pm Break

2:50pm

CEO Insurers Panel
Live Q & A

Phil Kewin, CEO, AFA
Facilitator

Damien Mu, CEO & Managing Director, AIA Australia and New Zealand

Justin Delaney, CEO, Life & Investments, Zurich Australia

Sean McCormack, Chief Life Insurance Officer, MLC Life

Brett Clark, Group CEO & Managing Director, TAL

3:55pm

Creating Your Own Vision
Live

Natalie Cook OAM OLY, Executive Director | Elite Success and Partnerships at Queensland Academy of Sport

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4:55pm

MC Wrap Up Day 1
Live

Nigel Collin, Master of Ceremonies

5:00pm

AFA Virtual Welcome Reception
Social Event

LIVE Program for Thur 15 October - NOW AVAILABLE ON PLAYBACK

8:45am

MC Welcome
Live
Nigel Collin, Master of Ceremonies

9:00am

Shadow Assistant Ministers Address
Live
Stephen Jones MP, Shadow Assistant Treasurer and Shadow Minister for Financial Services, Parliament of Australia

PARLIAMENT of AUSTRALIA

9:40am

Technology trends impacting advice firms in 2020 and beyond
Live Q & A
Peter Worn, Head of Strategic Relationships, Enzumo
Facilitator

Peter McCarthy, Founder & Director, MyProsperity

Michael Rouse, Founder & Executive Chairman, Creativemass

Charles Blake, Financial Services Specialist, Avanser

Johann Koch, Business Development Director, Intelliflo

10:45am **Break**

11:00am

Interactive Audience Session
Live
Nigel Collin, Master of Ceremonies

11:05am

Licensee Panel
Live Q & A
Andrew Inwood, Founder and Principal, CoreData
Facilitator

Darren Whereat, Chief Advice Officer, IOOF

Kate Anderson, Group Executive Advice Services and Solutions, Centrepoint Alliance

Allison Dummett, CEO, Matrix Planning Solutions

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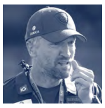
11:05am

Inspire Masterclass *(Optional Event)*
Persuasion: the science, tools and techniques to engage with your clients
Emily Kucukalic, Founder & Managing Director, Brand New You Group
Partnered by Trilogy

12:05pm



High Performance, Resilience and Leadership through Adversity
Live
Darren Burgess, High Performance Manager at Melbourne Football Club
Partnered by Zurich

12:50pm

Pulse Paraplanner Masterclass *(Optional Event)*
The Professional Paraplanner: building the vision, the brand and the pathways
Hayley Knight, Managing Director, Contract Paraplanning Services & AFA National Chair, Pulse

Kat Mock, Director & Head Paraplanner, Unity Paraplanning - UK based

Anne-Marie Esler, Managing Director, Padua Financial Group

Kate Fellows, Founding Director, The Professional Paraplanner
Facilitator

Johann Koch, Business Development Director, Intelliflo - UK based

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Genxt Masterclass *(Optional Event)*
Best practice Professional Year management for licensees and advisers
Charlie Green, AFA Genxt National Chair
Facilitator

Greg Cook, CEO Eureka Whittaker Macnaught

Harry Baker, Advice Associate, Eureka Whittaker Macnaught

Simone Munro, Head of Professional Development, Fortnum Private Wealth

Alisdair Barr, Founder and CEO, Striver

Phil Anderson, AFA General Manager Policy & Professionalism

LIVE Program for Thur 15 October - NOW AVAILABLE ON PLAYBACK

1:50pm

AFA Foundation

Live

Olivia Sarah-Le Lacheur, AFA Foundation Chair

2:05pm

Industry 5.0 The future for financial advice

Live

Dr Catherine Ball

Partnered by AIA

2:55pm

AFA President Address

Live

Marc Bineham, National President, AFA

3:15pm

A Q&A with Cathy Freeman OAM

This was a LIVE broadcast only and is not available as part of the Playback Program

Cathy Freeman OAM

Partnered by TAL

4:15pm

Highlights & Reflections

Live

Nigel Collin, Master of Ceremonies

On-Demand Sessions

The Importance of Prevention in Unprecedented Times

Explore the lesser known impacts of the pandemic of Australia's population, the role of disease prevention and health promotion and understanding wellbeing for yourself and your clients.

Caryn Kave, Wellbeing Strategy Lead, AIA

Performance in a World of Distractions

Positive mindset shifts to respond to set-backs and building engagement with clients remotely.

Chelsea Pottenger, Director, EQ Minds,

Partnered by AMP Wealth

The Art and Science of Insurance Pricing

The ins & outs of portfolio pricing & coaching your clients so they remain protected at the right price & value.

Peter Baker, Actuary, AMP Life

Best Interest Duties, Goals Based Advice, Scoping & Scaling Advice

Best interest duties, goals-based advice, scoping & scaling of advice are all difficult concepts to apply in practice. We'll show you how to integrate all 3 through technology.

Hans Egger, Managing Director, Astute Wheel

Craig Buntain, Practice Development Manager, CFL Financial Planning

Boosting productivity with smart technology

Explore how you can take control of your personal and business operations to achieve exponentially greater productivity.

Charles Blake, Financial Services Specialist, Avanser

Life less ordinary

This session examines the advice opportunities emanating from the wealth protection needs of the Australian HNW community.

Steve Craig, Head of Adviser Distribution, BT Life Insurance

Ben Martin, Senior Technical Manager, BT Life Insurance

Increasing your value proposition to clients

Examining advice opportunities outside of super and strategies for intergenerational wealth transfer.

Allison Macfarlane, Distribution Manager NSW, Centuria

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On-Demand Sessions



Modern Advice: What's the Difference between Change and Reinvention

Modern advice - the difference between change and reinvention.

Chris Shannon, Head of Retail Sales, Colonial First State

Dean Gilkison, Financial Adviser, Gilkison Group

Andrew Inwood, Founder and Principal, CoreData

Understanding the FASEA Code of Ethics: Deep Dive into Standard 12

Upholding the ethical standards of the profession & obligations in supervising a provisional adviser.

Troy Smith, Senior Technical & Regulatory Change Manager, IOOF



Dettol to Data: The Investment Opportunities thrown up by COVID-19

Psychological consequences of the pandemic for consumer behaviour & consequences for investment decisions.

Rosie Malcolm, Head of Franchises & Portfolio Manager, Magellan Financial Group

Ryan Joyce, Portfolio Manager - Co-head of TCM, Magellan Financial Group

Frank Casarotti, General Manager - Distribution, Magellan Financial Group

A Nerd's Eye View of Income Protection

Proposed APRA changes to income protection & the advantages & disadvantages of income protection cover in & out of super.

Dr Jeffrey Scott, Head of Advice Strategy, MetLife



Ask The Experts: Exploring Emerging Medical Trends in 2020

Medical trends/strategies you can use navigating medical headwinds, protecting the wellbeing of yourself, clients & employees.

Alex Kelly, MLC Life Insurance

Benson Riddle, Best Doctors, Chief Medical Officer, Teladoc Health & Co-Founder, Director, Chief Medical Officer Alixir

Dawn Cohen, Clinical Psychologist, MLC Life Insurance

On-Demand Sessions

Playing to your strengths

The role of managed accounts in actively managing client exposure in volatile markets and how to free up your time to focus on your clients.

Al Clark, Head of Investments, MLC Asset Management

John Woods, Portfolio Manager, MLC Asset Management

Jason Komadina, Director, Managed Accounts, MLC Asset Management

Mandy Mannix, General Manager, Distribution, MLC Asset Management

MLC ASSET MANAGEMENT

Price is What You Pay, Value is What You Get

Exploring why we place such importance on value & valuations & approaches that can benefit you & your clients.

Jody Fitzgerald, Head of Institutional Portfolio Management & Solutions, Morningstar

MORNINGSTAR®

The great consumer shift: how Covid-19 has changed customer expectations forever

Demand for digital services was already on the rise, with the shock of Covid-19 consumers have flocked to online. As a result, client expectations will never be the same.

Andrew Braun, General Manager Marketing, Netwealth Investments

netwealth

Ethical investing: thinking beyond GenY

This on-demand session provides an overview of ethical investing and Sunsuper's Socially Conscious Balanced Option.

Natasha Traugott, Portfolio Analyst, Sunsuper

sunsuper

Compare The Pair: It's in our best interests

FASEA Code of Ethics goes beyond Corporations Law obligations. Practical tips to improve client experience & comply with best interest duty.

David Glen, National Technical Manager, TAL

Scott Hoger, Technical Business Development Manager, TAL

TAL

Estate Planning in an Ever-changing Digital Environment

The estate planning basics to provide a timely, cost effective & user friendly digital solution for your clients.

Aruna Wickremasingha, Co-Founder, Your Wills

Your Wills™

On-Demand Sessions



Mortgage trusts: A compelling option for income

In this Q&A with financial advisers, you'll understand mortgage trusts, what they offer for advisers and clients and a current property update.

Nicole Ott, National Adviser Services Manager, Trilogy

Clint Arentz, Head of Lending & Property Developments, Trilogy

Walter Raspopin, Business Development Manager, Trilogy

The Client Connection: Lessons in Leisure

Shifting trends in advice, in how leisure activities & non-financial needs alter the way in which advisers engage with clients.

Adam Crabbe, Risk Strategy Specialist, Zurich

What retirement is about

There are 31 areas which people need to consider both before they retire in after they have been retired and it's not all about money.

Peter Graham, Retirement Coach, Redefining Retirement


Outsourcing Solutions including Paraplanning, Administration, SOA Support & Building Support Teams

We explore outsourcing solutions for Advisers and Licensees in a case study of a lived experience; the reason for outsourcing; what to look for a good outsource partner; security protocols; what were the outcomes and what contributed to them.

Allison Hays, Managing Director, Paperwork Magic

Karen Raine, Consultant, Paperwork Magic

Navigating changing markets: opportunities across the credit spectrum

Understand what an investment in credit looks like, what it looks like in an investment portfolio and why we think opportunities exist for the cautious investor.

Manusha Samaraweera, Vice President, Fixed Income Strategist, PIMCO



Understanding Retirement Villages

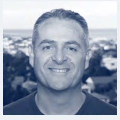
With an ageing population more people are over 65 than ever before. Where will they all live? Will they stay in their own home, downsize to something smaller or move into a retirement village?

Rachel Lane, Principal - Aged Care Gurus

Danielle Lim, Principal - DSL Law

Marilyn Graham, Group Sales Manager, AVEO Group

On-Demand Sessions



Cracking the Code to Pricing Advice

Identifying the key factors that make pricing advice difficult and introduction to a flexible but solid framework to price advice.

Jason Poole, Managing Director, GPA Matrix / Client First Advisors

How to price your advice to satisfy Fasea Standard 7 and build a sustainable business.

Practical insights and strategies for financial advisers to face today's pricing challenges.

Sue Viskovic, Founder & Managing Director, Elixir Consulting

TPB A to Z: all you need to know to meet your Tax Practitioner Board requirements

An in-depth session on TPB responsibilities for financial advisers and recent COVID-19 relief.

Phil Anderson, General Manager - Policy & Professionalism, AFA

Michael O'Neill, Chief Executive Officer/Secretary, Tax Practitioners Board

Best You: Anxiety and getting ready to return to the workplace

Impacts of COVID-19 on mental health and transitioning back to the workplace

Stella Savvides, Head of Clinical Quality & Innovation, Benestar

Beulah Joseph, Service Delivery Manager Onsite Services, Benestar

Sessions are AFA CPD Accredited.
FASEA learning categories for each session available on the conference platform.