WealthAdviser

Adelaide Professional Development Day | 22 August 2024

Adelaide Pavilion
Corner South Tce & Peacock Rd, Adelaide

Session time	Session title	Presenter	Company
8.30 – 9.00 am	**Registration and Arrival**	**Tea/Coffee**	
9.00 – 9.10 am	**Welcoming Address**	**Emma Crothers** **Regional Manager**	**WT Financial Group**
9.10 – 9.50 am	**Common Income Stream Questions** In an interactive session led by Mindy Ding, Technical Strategy Manager in AMP's TapIn team, you'll step through the answers to frequent adviser questions on retirement income streams and learn how to level-up your client strategies. From 'Using TTRs to lock in tax-free components' to 'Starting pensions and avoiding CGT', this session will equip you with practical insights you'll be excited to apply.	**Mindy Ding** **Technical Strategy Manager**	**North**
9.50 – 10.30 am	**Inflation, Interest Rates, and Investing Across the Yield Spectrum** With interest rates returning to more normalised levels, in this session InvestSense will present on the outlook for inflation, the implication for interest rates and how that relates to investing across different asset classes and sub-asset classes across the yield spectrum.	**Fil Andronaco** **Director**	**InvestSense**
10.30 – 10.50 am	**Morning Tea Break**		
10.50 – 11.30 am	**The Intergenerational Wealth Transfer and Insurance** With a major intergenerational wealth transfer underway, discover how life insurance can build client relationships before they need comprehensive financial advice. This session explores how financial planners can use new advice models and technology to write life insurance profitably and compliantly, creating new revenue streams and establishing trust with the next generation of clients.	**John Griffiths** **Business Development Manager**	**NEOS**

11.30 – 12.30 pm	**Back Office Excellence** Join our adviser panel discussion on optimizing back-office systems and processes. Experts will share insights into managing diverse support models, including outsourced virtual assistants, salaried staff, junior employees, and professional year advisers. Learn strategies to deliver consistent client experiences, enhance efficiency, and maintain high service standards. Essential for advisers refining back-office operations.	**Panel Session Moderated by Keith Cullen**	
12.30 – 1.30 pm	**Lunch**		
1.30 – 2.10 pm	**Business Insurance Trusts** Unlock the potential of business insurance trusts! This session covers their structure, applications in buy/sell agreements, key person insurance, and personal cover. Discover tax and commercial advantages and compare them with other ownership structures. Learn through practical case studies to enhance your business insurance strategy effectively.	**Alex Koodrin** **National Technical Manager**	**ClearView Life**
2.10 – 2.50 pm	**Portfolio Construction in the Current Market Environment** Investors today face unique challenges in building portfolios due to a complex investment environment. Key issues include higher interest rates, inflation uncertainty, and geopolitical factors. Additionally, AI and other technological advances add to the complexity. These factors challenge traditional diversification parameters, requiring careful consideration in portfolio framework and strategic asset allocation.	**Rebecca Jacques** **Head of Portfolio Solutions**	**Mercer**
2.50 – 3.15 pm	**Group Update/Q&A Session**	**Keith Cullen** **Managing Director**	**WT Financial Group**
3.15 – 3.30 pm	**Wrap-Up | End of Day**		
3.30 – 4.30 pm	**Please join us for drinks**		

To attend in person please register your attendance at:

Adelaide PD Day In-Person Registration

To watch all sessions via livestream and participate in Q&A remotely please register your attendance at:

Adelaide PD Day Live Stream

SENTRY Synchron wealthtoday millennium3

wtfglimited.com