

# Principals' briefing & Masterclass

4 March 2021 | BT Financial Group - 91 King William Street, Adelaide

Time	Agenda item	Speaker
10.30am - 12.00pm	<b>Principals' briefing</b> Madison strategy update and the next 100 days. <i>For principal advisers &amp; business owners.</i>	<b>Annick Donat,</b> Chief Executive
12.00pm - 12.30pm	Lunch	
12.30pm - 2.00pm	<b>Masterclass - Royal Commission Changes</b> Client Fee Consent and Annual Fee Arrangements <i>For all advisers and their support teams</i>	<b>Greg Dawes,</b> Advice Coach
2.00pm - 2.15pm	Afternoon tea	
2.15pm - 4.15pm	<b>Masterclass - Practice Dashboard</b> A single view of your clients. The dashboard will provide access to valuable client and business insight helping you to measure objectives for your client offering, revenue growth, efficiency, and risk management. <i>For all advisers and their support teams</i>	<b>Megan Thomson,</b> Advice Integration Manager

# PD Day

**5 March 2021 | BT Financial Group - 91 King William Street, Adelaide**

Time	Agenda item	Speaker
8.15am - 9.00am	Registration	
8.30am - 9.00am	<b>Welcome</b> Business and strategy update	<b>Annick Donat,</b> Chief Executive
9.00am - 10.00am	<b>2021 Economic Market Update</b>	<b>John Abernethy,</b> Founder - Clime
10.00am - 11.00am	<b>Portfolio Construction: Challenge your thinking</b>	<b>Rebecca Jaques,</b> Senior Consultant - Mercer
11.00am - 11.15am	Morning Tea	
11.15am - 12.00pm	<b>Ethics in Risk Professionals: Walking the thin line</b>	<b>Mark Neil,</b> Risk Strategy Specialist - Zurich
12.00pm - 12.45pm	<b>The new world of income protection advice</b>	<b>Benjamin Martin,</b> Senior Technical Manager - AIA
12.45pm - 1.30pm	Lunch	
1.30pm - 2.30pm	<b>Active Reviews</b> A peer lead discussions around the new Active Review process	<b>Kerry Fleming,</b> Advice Coach
2.30pm - 3.15pm	<b>Are transition to retirement strategies still worthwhile?</b>	<b>Neil Sparks,</b> National Manager SMSF Strategy - BT
3.15pm - 3.30pm	<b>Introducing the Adviser Council</b> Who are they, what role do they play?	<b>The Madison team</b>
3.30pm	Closing drinks	