

Principals' briefing & Masterclass

15 March 2021 | Christie Spaces - 320 Adelaide Street, Brisbane

| Time | Agenda item | Speaker |
|-------------------|---|--|
| 10.30am - 12.00pm | Principals' briefing Madison strategy update and the next 100 days. <i>For principal advisers & business owners.</i> | Annick Donat, Chief Executive |
| 12.00pm - 12.30pm | Lunch | |
| 12.30pm - 2.00pm | Masterclass - Royal Commission Changes Client Fee Consent and Annual Fee Arrangements <i>For all advisers and their support teams</i> | Kerry Fleming, Advice Coach |
| 2.00pm - 2.15pm | Afternoon tea | |
| 2.15pm - 4.15pm | Masterclass - Practice Dashboard 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> | Megan Thomson Advice Integration Manager |

PD Day

16 March 2021 | Christie Spaces - 320 Adelaide Street, Brisbane

| Time | Agenda item | Speaker |
|-------------------|--|--|
| 8.15am - 9.00am | Registration | |
| 8.30am - 9.00am | Welcome Business and strategy update | Annick Donat, Chief Executive |
| 9.00am - 10.00am | Leadership 'All ships lift in a rising tide'. If one can connect with themselves and their business they can then interconnect with their peers and the market as a whole. This "WE" focussed approach leads to synchronised growth and ultimately benefits all. | Anthony Noud, Founder - Awakened Lifestyles |
| 10.00am - 11.00am | 2021 Economic Market Update | John Abernethy, Founder - Clime |
| 11.00am - 11.15am | Morning Tea | |
| 11.15am - 12.00pm | Ethics for Risk Professionals: Walking the thin line | Mark Neil, Risk Strategy Specialist - Zurich |
| | OR SMSF Succession Planning - 'These are not the SMSF members you are looking for' | Bryan Ashenden, Head of Financial Literacy & Advocacy - BT |
| 12.00pm - 12.45pm | Are transition to retirement strategies still worthwhile? | Matt Manning, Technical Adviser - BT |
| | OR All things about Life insurance inside SMSF's | Benjamin Martin, Senior Technical Manager - AIA |
| 12.45pm - 1.30pm | Lunch | |
| 1.30pm - 2.30pm | Active Reviews A peer lead discussions around the new Active Review process | Kerry Fleming, Advice Coach |
| 2.30pm - 3.15pm | Portfolio Construction: Challenge your thinking | Rebecca Jacques, Senior Consultant - Mercer |
| 3.15pm - 3.30pm | Introducing the Adviser Council Who are they, what role do they play? | The Madison team |
| 3.30pm | Closing drinks | |