

# Principals' briefing & Masterclass

2 March 2021 | Victory Office - Level 35, 600 Bourke Street, Melbourne

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>Kerry Fleming,</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

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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>Dale Pereira,</b> Head of Client Solutions - Pandal
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>SMSF Succession Planning - 'These are not the SMSF members you are looking for'</b>	<b>Tim Howard,</b> Advice Technical & Regulatory - BT
12.00pm - 12.45pm	<b>All things about Life insurance inside SMSF's</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>The Advisable Australian</b>	<b>Andrew Braun,</b> GM of Marketing - Netwealth
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	