

Principals' briefing & Masterclass

9 March 2021 | L'Aqua Rooftop Level, Cockle Bay Wharf, Darling Park Sydney

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>	Greg Dawes 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

10 March 2021 | L'Aqua Rooftop Level, Cockle Bay Wharf, Darling Park Sydney

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	Adam Crabbe , 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	Greg Dawes 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	