

November 2021 - Upcoming Webinars

Monday

1

8

15

22

29

Tuesday

2
12.30pm (AESTDT) - Advice & Governance Webinar Series

9

16
12.30pm (AESTDT) - Advice & Governance Webinar Series

23

30
12.30pm (AESTDT) - Advice & Governance Webinar Series

Wednesday

3
1.00pm (AEST) - Madison Investment Update: International Equities

10

17
1.00pm (AESTDT) - Madison Investment Macro Update

24

1
1.00pm (AESTDT) - Investment Update webinar 'Portfolio Construction'

Thursday

4
11.00am (AEST) 'Meet with Megan' Enhanced FDS and Review process

11
11.00am (AEST) 'Meet with Megan' Risk Researcher

18
11.00am (AEST) 'Meet with Megan' WealthSolver

25
11.00am (AEST) 'Meet with Megan' Xtools+ CALM

2
11.00am (AEST) 'Meet with Megan' Advice SoA generation - Investment & Pension strategy

Friday

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October - November 2021 - Upcoming Webinars

Monday

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Tuesday

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Wednesday

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Thursday

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Friday

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12.30pm (AESTDT) - Advice & Governance Webinar Series

1.00pm (AESTDT) - Investment Update webinar 'Macro Update'

11.00am (AEST) 'Meet with Megan' Client Fact Find Wizard

9.30am (AESTDT) 'Asset protection, structuring, succession planning and Estate planning' with Chris Balalovski

11.00am (AEST) 'Meet with Megan' Datafeeds, CommPay & Invoicing

12.30pm (AESTDT) - Advice & Governance Webinar Series

1.00pm (AEST) - Madison Investment Update: International Equities

11.00am (AEST) 'Meet with Megan' Enhanced FDS and Review process

11.00am (AEST) 'Meet with Megan' Risk Researcher

12.30pm (AESTDT) - Advice & Governance Webinar Series

1.00pm (AESTDT) - Madison Investment Macro Update

11.00am (AEST) 'Meet with Megan' WealthSolver

September - October 2021 - Upcoming Webinars

Monday

Tuesday

Wednesday

Thursday

Friday

27

28

12.30pm (AEST) - Design & Distribution Obligations Webinar Series

29

1.00pm (AEST) - Ethical Investing with Pandal Group

30

1

4pm (AEST) - Friday afternoon Drinks

4

5

12.30pm (AESTDT) - Advice & Governance Webinar Series

6

7

10.30am (AESTDT) - Understanding your revenue reporting in Xplan

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14

11.00am (AEST) 'Meet with Megan' New User Fundamentals

15

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19

12.30pm (AESTDT) - Advice & Governance Webinar Series

20

1.00pm (AESTDT) - Investment Update webinar 'Macro Update'

21

11.00am (AEST) 'Meet with Megan' Client Fact Find Wizard

22

4pm (AESTDT) - Friday afternoon Drinks

25

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28

11.00am (AEST) 'Meet with Megan' Datafeeds, CommPay & Invoicing

29

September 2021 - Upcoming Webinars

Monday

Tuesday

Wednesday

Thursday

Friday

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12pm (AEST) - Meet with Megan
'Dynamic Xplan and SoA'

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12.30pm (AEST) - Advice &
Governance Webinar Series

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9

Online - Masterclass for Support
Teams

2.00pm (AEST) - Meet with Megan
'Dynamic Xplan and SoA'

10

4pm (AEST) - Friday afternoon
Drinks

13

14

12.30pm (AEST) - Design &
Distribution Obligations
Webinar Series

15

1.00pm (AEST) - Investment
Update webinar 'Macro Update'

16

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21

12.30pm (AEST) - Advice &
Governance Webinar Series

22

23

10am - 11.45am (AEST) - Virtual
Express Experts, APRA
Sustainability Measures - Day 1

24

10am - 11.45am (AEST) - Virtual
Express Experts, APRA
Sustainability Measures - Day 2

27

28

12.30pm (AEST) - Design &
Distribution Obligations
Webinar Series

29

1.00pm (AEST) - Ethical Investing
with Pandal Group

30

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4pm (AEST) - Friday afternoon
Drinks

August - September 2021 - Upcoming Webinars

Monday

Tuesday

Wednesday

Thursday

Friday

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Online - Good Governance Summit

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Online - Good Governance Summit

19

12pm (AEST) - Meet with Megan 'Dynamic Xplan and SoA'

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24

12.30pm (AEST) - Futurity Education Bond - Unlocking the Strategies

25

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12pm (AEST) - Meet with Megan 'Dynamic Xplan and SoA'

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2

12pm (AEST) - Meet with Megan 'Dynamic Xplan and SoA'

3

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7

12.30pm (AEST) - Advice & Governance Webinar Series

8

9

Online - Masterclass for Support Teams

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15

16

12pm (AEST) - Meet with Megan 'Dynamic Xplan and SoA'

17

August 2021 - Upcoming Webinars

Monday

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Tuesday

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12.30pm (AEST) - Advice & Governance Webinar Series

17

Online - Good Governance Summit

24

12.30pm (AEST) - Futurity Education Bond - Unlocking the Strategies

31

Wednesday

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11

12pm (AEST) - Futurity Education Bond - Unlocking the Strategies

18

Online - Good Governance Summit

25

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Thursday

5

12pm (AEST) - Meet with Megan 'Xtools CALM'

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Friday

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July/August 2021 - Upcoming Webinars

Monday

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Wednesday

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Thursday

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Friday

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2

2pm (AEST) - Monthly Investment Update

12pm (AEST) - Meet with Megan 'WealthSolver'

12.30pm (AEST) - Advice & Governance Webinar Series

12pm (AEST) - Meet with Megan 'Xtools CALM'

12.30pm (AEST) - Advice & Governance Webinar Series

Online - Good Governance Summit

Online - Good Governance Summit

June - July 2021 - Upcoming Webinars

Monday

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12.30pm (AEST) - Advice & Governance Webinar Series

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12.30pm (AEST) - Advice & Governance Webinar Series

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Wednesday

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7

2pm (AEST) - Building your Investment Philosophy

14

21

2pm (AEST) - Monthly Investment Update

28

Thursday

1

12pm (AEST) - Meet with Megan 'FOFA compliance producing FDS & Opt in documents'

8

15

12pm (AEST) - Meet with Megan 'Risk Researcher'

22

12pm (AEST) - Meet with Megan 'WealthSolver'

29

12pm (AEST) - Meet with Megan 'Xtools CALM'

Friday

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30

June 2021 - Upcoming Webinars

Monday

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1pm (AEST) - Informed Investor

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Tuesday

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12.30pm (AEST) - Enhanced FDS
Webinar series

15

12.30pm (AEST) - Advice &
Governance Webinar Series

22

12.30pm (AEST) - Enhanced FDS
Webinar series

29

12.30pm (AEST) - Advice &
Governance Webinar Series

Wednesday

2

9

16

2pm (AEST) - Building your
Investment Philosophy

23

30

3pm (AEST) - MFG Monthly
Connector

Thursday

3

10

12pm (AEST) - Meet with Megan
'Task & Threads'

17

12pm (AEST) - Meet with Megan
'Datafeeds'

24

12pm (AEST) - Meet with Megan
'CommPay & Invoicing'

1

12pm (AEST) - Meet with Megan
'FOIA compliance producing FDS
& Opt in documents'

Friday

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May - June 2021 - Upcoming Webinars

Monday

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Tuesday

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12.30pm (AEST) - Advice & Governance Webinar Series

11

12.30pm (AEST) - Enhanced FDS Webinar series
'Fee Consent'

18

12.30pm (AEST) - Advice & Governance Webinar Series

25

12.30pm (AEST) - Enhanced FDS Webinar series
'Planning for the transition'

1

12.30pm (AEST) - Advice & Governance Webinar Series

Wednesday

5

10am (AEST) - Power BI & Xeppo 'Insurance Reporting'

12

19

2pm (AEST) - MFG Investment Update

26

3pm (AEST) - MFG Monthly Connector

2

Thursday

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13

20

12pm (AEST) - Meet with Megan 'New user fundamentals'

27

12pm (AEST) - Meet with Megan 'Client Fact Find Wizard'

3

12pm (AEST) - Meet with Megan 'Task and Threads'

Friday

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