

ifa BUSINESS STRATEGY DAY 2018

MELBOURNE
Tuesday 20 March
Rydges Melbourne (CBD)

SYDNEY
Thursday 22 March
Dockside Cockle Bay Wharf

BRISBANE
Monday 26 March
Hotel Grand Chancellor

PERTH
Wednesday 28 March
Pan Pacific Perth

EVENT OVERVIEW

Australia's best professional development day for independently-minded and self-licensed advice practices is back in 2018, helping you to wade through the noise and develop more profitable, client-centric and tech-enabled businesses.

Building on the themes developed over the past four years, this unique event will lean on ifa's unrivalled editorial contacts to bring you practical, implementable business-building content with an eye on all the latest headlines and developments changing the advice landscape.

8.30am REGISTRATION OPENS

9.00am CONFERENCE COMMENCES

MC WELCOME - BUSINESS BUILDING IN A MORE SPLINTERED MARKET

Aleks Vickovich, managing editor, ifa

In the 12 months since the last Business Strategy Day, the trend towards self-licensing has increased with warmth for individual licensing growing from both advisers as well as regulators. This model can have benefits for IFA firms, but it also contains challenges. Whether self-licensed or within a licensee network, all advisers need to seek P2P learnings, best practice and be willing to experiment.

LEGISLATIVE UPDATE: THE RISE OF REGTECH AND ART OF THE SOA

Speaker TBA

With a range of new laws set to affect the business of financial advice, and a new regulatory body in FASEA, this important session will provide an update on the compliance and legislative landscape and tips to help reduce the compliance burden. Topics will include ASIC's risk SOA, the best interest duty, the new education standards, ASIC's s923A clarification and emerging RegTech solutions to alleviate the red tape.

SELF-LICENSED SUCCESS SHOWCASE

Moderator: Aleks Vickovich, managing editor, ifa

Panelists: TBC

Principals of self-licensed practices will share the pros and cons of this model, the things to consider before taking the leap, the enablers of growth and profitability in their business and their approach to client-servicing.

SUCCESSFULLY TRANSITIONING TO A MODERN ADVICE FIRM

Sue Viskovic, Elixir Consulting

Reflecting on bespoke research and her work providing trusted guidance to advice firms across the country, business coach and sought-after speaker Sue Viskovic will lay out the paths for advice firms to master pricing, business planning and growth in the new world.

THE ENABLERS OF IFA GROWTH

Moderator: Aleks Vickovich, managing editor, ifa

Panelists: TBC

Taking the theoretical into the practical, the partners of the ifa Business Strategy Day will weigh in on the technology and other solutions they feel can help drive business success for IFAs, their support of the independent sector and feedback from their distribution networks.

SESSION TBC

ANATOMY OF A VALUABLE AND PROFITABLE FIRM

Steve Prendeville, Forte Asset Solutions

Arguably Australia's top expert on financial services industry mergers and acquisitions, Steve Prendeville will zero in on case studies of top performing financial advice firms to help you increase the value of your firm, whether sale and retirement are on the cards or you are setting up for decades of growth and sustainability.

KICKSTARTING A CONTENT STRATEGY

Jenny Pearse, Jenesis Consulting

Articulating your value proposition and developing your profile as an expert and trusted adviser in the community has never been more important. Armed with the latest findings from the burgeoning financial blogger landscape in the United States, Jenny Pearse will give you practical tips to build an online presence, a personal audience or a more engaged client base.

5.00pm CLOSING REMARKS

Aleks Vickovich, managing editor, ifa

*times subject to change