



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 - 9.00am REGISTRATION OPENS

9.00am - 9.05am 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.

9.05am - 9.50am LEGISLATIVE UPDATE: THE RISE OF REGTECH AND ART OF THE SOA

Sean Graham, Assured Support

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.

9.50am - 10.35am SELF-LICENSED SUCCESS SHOWCASE

Moderator: Chris Digby, Jigsaw & SMSF Advice

Panelists: TBA

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.

10.35am - 11.05am MORNING TEA

11.05am - 11.50am 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.

11.50am - 12.35pm THE ENABLERS OF IFA GROWTH

Moderator: Aleks Vickovich, ifa

Panelists: TBA

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.

12.35pm - 1.35pm LUNCH

1.35pm - 2.05pm BUILDING PROFITABLE AND EFFICIENT IFA FIRMS

Geoff Rogers, NAB Wealth Distribution

Drawing on its in-house research and decades of working with third-party intermediaries, MLC will outline some of the cutting edge trends helping leading IFA firms achieve profitability, efficiency and client value in their practice. The session will cover asset management, including the rapid rise of managed accounts and changing obligations in financial advice.

2.05pm - 2.50pm 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.

2.50pm - 3.20pm AFTERNOON TEA

3.25pm - 4.10pm 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.

4.10pm - 4.15pm CLOSING REMARKS

Aleks Vickovich, managing editor, ifa

CONFERENCE CLOSE

*times subject to change

*times in Brisbane will be 30 minutes later for all sessions with the Conference commencing at 9:30am

*in Melbourne "Successfully Transitioning to a Modern Advice Firm" will occur at 1.35pm with "Building Profitable and Efficient IFA Firms" occurring at 11.05am