

# MERIT WEALTH CONFERENCE 20 OCTOBER 2016

## PROGRAM

<b>Thursday, 20 October 2016</b>	<b>Welcome: The Westin, Sydney</b>
9:00am – 9:30am	<b>Registration, Tea &amp; coffee - Dress Code: Business Casual</b> Ballroom 4, The Westin Hotel, 1 Martin Place Sydney
<b>Conference</b>	
9:30 – 9:40am	<b>Opening Conference &amp; Merit Wealth Update</b> Greg Hayes, CEO Merit Wealth
9:40 – 10:15am	<b>Overview of the SMSF marketplace: Where are your new SMSF clients coming from and the issues they face</b> Accurium
10:15 – 11:00am	<b>What the new Super Rules mean for SMSFs</b> Garth McNally, Director, Merit Wealth
<b>11:00– 11:30am</b>	<b>Morning Tea, Outside the Ballroom</b>
11:30 – 12:15pm	<b>Estate Planning Essentials for ALL SMSF Members</b> Garth McNally, Director, Merit Wealth and Bhavesh Mistry, MistryFallahi Lawyers
12:15 – 1:00pm	<b>Foundation Statements of Advice: Limiting risk by drawing a line in the sand</b> David Moss, Accountants Services Director, Merit Wealth
<b>1:00 – 1.45pm</b>	<b>Lunch, Outside the Ballroom</b>
1.45 -2.30 pm	<b>Economic impacts to the SMSF space</b> Julie Scurfield, National IFA & Accounting Channel Manager, Vanguard
2.30 – 3.00pm	<b>Business Opportunities that Exist in your Practice</b> Justin Viney, National Practice Development Manager, Merit Wealth
3.00 – 3:40pm	<b>Fees of the Future: Licensing - A Cost vs. Fee Generator</b> David Moss, Accountants Services Director, Merit Wealth
3:40 – 4.00pm	<b>Afternoon Tea, Outside the Ballroom</b>
4:00 – 4:45pm	<b>Delivering SMSF Advice</b> Adviser Panel Discussion facilitated by Greg Hayes
4.45 – 5.00 pm	<b>Extending your licence capability – advising on cash products</b> Greg Hayes, CEO Merit Wealth
5.00pm	<b>Conference Wrap Up</b> Greg Hayes, CEO Merit Wealth
<b>Gala Dinner, Heritage Ballroom Level 6, The Westin Sydney</b>	
6:15pm arrival for drinks	<b>Welcome Drinks – Dress Code: Business Casual</b>
7:00pm sit down dinner	<b>Dinner – time to network and have some fun</b>
11.00pm	<b>Conclusion</b>