



Merit Wealth Business Owners Forum

Facilitator	Justin Viney	Date	Thursday, 31 August, 2017
Location	Press Room, Radisson Hotel, Pitt St Sydney (enter via Pitt St and down the stairs)	Time:	10.00am - 6.00pm

Forum Agenda		
Time	Topic	Presenter
10.00am	Registration	
10.30am	Welcome and Merit Wealth update. Introduction to Grahame Evans	Greg Hayes / Grahame Evans
11.00am	Growing your team – “getting employer ready” and finding the right adviser to help grow your business	Dugald Braithwaite
12.00pm	Optimal business structure for tax effectiveness and flexibility	Greg Hayes
1.00pm	Lunch – (20 min break – then Open Forum over working lunch)	Justin Viney
2.00pm	Social Media and Financial Services – The New Frontier	Tom Loneragan (Latch Consulting Group)
2.45pm	Utilising technology in your practice to build efficiency	Dylan Smith
3.45pm	Forum wrap up – take outs	Justin Viney
4.00pm – 6.00pm	Networking & Drinks – Lady Fairfax room (Ground floor)	

All of the sessions will be workshop format with group input invited. The day is designed to capture the collective intelligence of the group.

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