

AGENDA MERIT WEALTH CONFERENCE

Barossa 2017: Harvest

Wednesday, 8 November 2017 Business Owners Forum

1:00 – 4:00pm **12:30 Registration for 1pm commencement**
MW Business Owners Forum: Working lunch
 Semillon Room A & B

Wednesday, 8 November 2017 Welcome drinks

7:00pm – 9:00pm **Welcome Drinks – Dress Code: Smart Casual**
 Poolside, Novotel Barossa

Thursday, 9 November 2017 Day 1: Conference (Technical)

8:30 – 9:00am **Registration - Dress Code: Smart Casual**
 Shiraz Room A & B

9:00 – 9:15am **Opening Conference & Merit Wealth Update**
 Greg Hayes, CEO Merit Wealth

9:15 – 10:00am **Economic Update**
 Matthew Tufano, Economist, Vanguard

10:00 – 10:45am **2025: Past, Present, future: Planning technology to 2025**
 Nick Mitchell, Head of sales, NetWealth

10:45 – 11:15am **Morning Tea**

11:15 – 12:00pm **Compliance Update & Key Compliance Issues**
 Scot Andrews, Head of Advice Merit Wealth

12:00 – 1:00 pm **Technical Workshop 1: Super Contributions post 1 July 2017**
 Bryan Ashenden, BT

1:00 – 2:00pm **Lunch**

2:00 – 3:00pm **Technical Workshop 2: Super Contributions post 1 July 2017 (cont)**
 Bryan Ashenden, BT

3:00 – 3:45pm **Life Insurance Framework: Changes from 1 January 2018**
 James O'Dwyer, Zurich

3:45 – 4:15pm **Afternoon Tea**

4:15 – 5:00pm **SMSF Legal issues: Solutions for client scenarios**
 John Wojtowicz, Law Central & Garth McNally, Merit Wealth

Thursday, 9 November 2017 Day 1: Concludes

6:00 - 8:00pm **Wine tasting & Canapes**
 Cellar room, Novotel Barossa

Free evening afterwards.
Have a quiet evening in or head into Tanunda or Lyndoch for a meal.

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Friday, 10 November 2017	Day 2: Conference (Business Improvement & Development)
8:30 – 9:00am	Registration – Dress Code: <i>Smart Casual</i> Shiraz Room A & B
9:00 – 9:45am	An Exercise in Time Travel: For a Future Happening Today Danielle Visser, Risk Strategy Specialist, Zurich
9:45 – 10:30am	Tools and resources for your business Rob McGregor – GPS, Garth McNally – Merit Wealth (sponsor tools)
10:30 – 11:00am	Morning Tea
11:00 – 11:30pm	Model Portfolios - CARE Grahame Evans, Merit Wealth
11:30 – 1:00pm	The Great Debate: MODUS OPERANDI VAN, MOR, ADV, GRAHAME EVANS MODERATOR
1:00 – 2:00pm	Lunch

1:15 – 2:30pm **Investment Committee Meeting (working lunch)**
Investment Committee Members only

Friday, 10 November 2017	Day 2: Concludes
5:00 – 7:30pm	Group activity: Jacobs Creek Vineyard Dress: Smart casual with comfortable shoes (bring something warm just in case) Please meet at front of hotel (near reception) at 4.20pm for bus transfer. Note: We will not be coming back to the Hotel until 11.00pm

Friday, 10 November 2017	Dinner
7:30 – 10:30pm	Group Dinner Jacobs Creek Vineyard

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Saturday, 11 November 2017		Day 3: Conference (Soft Skills)
8:30 – 9:00am	Registration - Dress Code: <i>Smart Casual</i> Shiraz Room A & B	
9:00 – 10:00am	Sales & The 5th Element: Why people buy you Dugald Braithwaite, Recruit 2 Advice (R2A)	
10:00 – 11:00am	Generating clients: What does it take Greg Hayes	
11:00 – 11:30am	Morning Tea	
11:30 – 12:30pm	Relationship Building & Management Will Douglas, Morgans	
12:30 – 12:45pm	Conference Wrap Up Greg Hayes, Merit Wealth	
12:45 – 1:45pm	Lunch	
Saturday, 11 November 2017		Day 3: Concludes
Free afternoon		
Saturday, 11 November 2017		Gala Dinner
6:30 – 11:00pm	Gala Dinner: Saltram Estate Dress: "Black & White with a touch of Gold" (Note: Not a black tie event & not a "costume" party) Please meet at front of hotel (near reception) at 6.00pm for bus transfer. Note: We will be returning to the Hotel around 11:30pm.	
Sunday, 12 November 2017		
11:00am	Checkout if not extending	