

MERIT WEALTH LAR CONFERENCE 28 JULY 2017

PROGRAM

Friday, 28 July 2017		Welcome: The Hilton Hotel, Sydney	
9:00am – 9:20am	Registration, Tea & coffee - Dress Code: Business Casual Hilton Hotel Sydney		
Conference – Level 2 State Room			
9:30 – 9:40am	Opening Conference & Merit Wealth Update Greg Hayes, CEO Merit Wealth		
9:40 – 10:20am	SMSF market place – where we are and what to expect Bryan Ashenden BT		
10:20 – 11:00am	Working with your SMSF Pension clients in 2017 Garth McNally, Director, Merit Wealth		
11:00 – 11:30am	Morning Tea, Outside the Ballroom		
11:30 – 12:00pm	How the economy will affect SMSFs in 2017/8 Will Douglas, Morgans		
12:00 – 12.45pm	Performing at your very best Katrina Webb, Gold Medal winning Paralympian		
12.45 – 1.30pm	Lunch, Outside the Ballroom		
1.30 – 2.10 pm	Enhancing your client relationship through behavioural coaching Julie Scurfield, National IFA & Accounting Manager Vanguard		
2.10 – 2.40pm	Risk Insurance inside a SMSF – why you would engage a professional adviser Jim Mills, Merit Wealth		
2.40 – 3:10pm	Risk Management as an LAR Scot Andrews, Merit Wealth		
3:10 – 3.30pm	Afternoon Tea, Outside the Ballroom		
3.30 – 4:00pm	Understanding the new Accounting & Advice business models Mark Weingarth, Macquarie Bank		
4.00 – 4.30 pm	Open Forum Greg Hayes, CEO Merit Wealth		
5.00pm	Conference Wrap Up		
Gala Dinner – Level 4, Hilton Hotel Sydney			
6:00pm arrival for drinks	Welcome Drinks – Dress Code: Business Casual		
7:00pm sit down dinner	Dinner – time to network and have some fun		
11.00pm	Conclusion		