

MERIT WEALTH LAR CONFERENCE 20 OCTOBER 2016

PROGRAM

Thursday, 20 October 2016	Welcome: The Westin, Sydney
9:00am – 9:30am	Registration, Tea & Coffee - Dress Code: Business Casual Ballroom 4, The Westin Hotel, 1 Martin Place Sydney
	Conference
9:30 – 9:45am	Opening Conference & Merit Wealth Update Greg Hayes, CEO Merit Wealth
9:45 – 10:15am	Overview of the SMSF Marketplace: Where are your new SMSF clients coming from and the issues they face Accurium
10:15 – 11:00am	Technical Update Garth McNally, Director, Merit Wealth
11:00 – 11:30am	Morning Tea, Outside the Ballroom
11:30 – 12:15pm	Estate Planning Essentials for ALL SMSF Members Garth McNally, Director, Merit Wealth and Bhavesh Mistry, MistryFallahi Lawyers
12:15 – 1:00pm	Foundation Statements of Advice: Limiting risk by drawing a line in the sand David Moss, Accountants Services Director, Merit Wealth
1:00 – 2:00pm	Lunch, Outside the Ballroom
2:00 – 2:45pm	Business Opportunities that Exist in your Practice Justin Viney, National Practice Development Manager, Merit Wealth
2:45 – 3:30pm	Fees of the Future: Licensing - A Cost vs. Fee Generator David Moss, Accountants Services Director, Merit Wealth
3:30 – 4:00pm	Afternoon Tea, Outside the Ballroom
4:00 – 4:45pm	Delivering SMSF Advice Adviser Panel Discussion facilitated by Greg Hayes
4.45 – 5.00pm	Conference Wrap Up Greg Hayes, CEO Merit Wealth
	Gala Dinner, Heritage Ballroom Level 6, The Westin Sydney
6:15pm 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