



Merit Wealth Professional Development Day

Facilitator	Garth McNally	Date	Tuesday, 21 February 2017
Location	Macquarie Conference Room Level 2, 1 Martin Place, Sydney Pitt Street entry (next door to the Westin Hotel)	Time:	9.00am

PD Day Agenda		
Time	Topic	Presenter
9.00am	Registration	
9.30am	PD Day Welcome	Garth McNally Director, Merit Wealth
9.45am	Technical Stream Technical Update & Overview	Bryan Ashenden Senior Manager, BT Financial Group
11.15am	Morning Tea	
11.40am	Business Development Stream Advisor Forum & Discussion: Planning & Action for Super reform measures. Strategies & Advice considerations	Facilitator: Garth McNally, Director, Merit Wealth
1.00pm	Lunch	
2.00pm	Business Development Stream Zurich Active: Accessing New Opportunities	Jessica Brady Risk Strategy Specialist, Zurich
2.40pm	Soft skills / Business Development Streams 2017 Marketing Plan	Justin Viney National Practice Development Manager, Merit Wealth
3.30pm	Afternoon Tea	
3.45pm	Business Development Stream Compliance & Business update	Scot Andrews Head of Advice, Merit Wealth
4.20pm	Soft Skills Advisor Success Stories	Matt Pack Head of Financial Planning, Hayes Knight (NSW)
4.40pm	PD Day Wrap Up	Garth McNally Director, Merit Wealth
4.50pm	Networking & Drinks	

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