

# March Masterclass

13 - 30 March 2023

Time	Description
8:45am	<b>Arrival and Registration</b>
9:00am	<b>Welcome</b>
9:10am	<p><b>Company Update</b>  <b>Presenter:</b> CEO/Group Executives  <b>CPD areas:</b> N/A</p>
9:30am	<p><b>Market Review – What is keeping you up at night?</b>            In this session, we will provide a review of markets, as well as an outlook for 2023 covering what has changed and what has remained the same. We will workshop market scenarios. This will be an open session where advisers can discuss what their clients are saying and what keeps advisers up at night. We will also share our initiatives for 2023.  <b>Presenter:</b> Research team  <b>CPD areas:</b> General</p>
10:30am	<b>Morning Tea Break</b>
10:50am	<p><b>Show me the money!</b>            In this session, we will explore the legal, ethical and practical issues to consider when it comes to how you get paid. We look at advice fees and commissions, share practical tips and learnings from fee complaints.  <b>Presenter:</b> Nicole Alexander, Head of Licensee Standards  <b>CPD areas:</b> Regulatory Compliance &amp; Consumer Protection, Professional &amp; Ethics</p>
11:35am	<p><b>Looking under the hood</b>            The Technical Team will be taking a deep dive into several emerging opportunities for advisers and their clients, including:</p> <ul style="list-style-type: none"> <li>• Indexation of the Transfer Balance Cap – what it means, how it works, and who will benefit</li> <li>• Home Equity Access Scheme – the government’s own reverse mortgage scheme</li> </ul> <p><b>Presenter:</b> National Technical Managers  <b>CPD areas:</b> N/A</p>
12:35pm	<b>Lunch</b>
1:30pm	<p><b>Practice Development Peer Insights</b>            This will be an interactive session to share insights with your peers.  <b>Presenter:</b> Regional Managers  <b>CPD areas:</b> General</p>
3:00pm	<b>Wrap-up and Close</b>