CENTREPOINT ALLIANCE

Virtual Masterclass

Day 1: Tuesday, 16 May 2023

Time	Description
10 mins before	**Arrival, technology check and welcome to Day 1** *Each webinar has its own attendance link which you will receive in the calendar invite upon registration for a webinar.* *Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.*
Session 1 AWST 9:00am ACST 10:30am AEST 11:00am	***Behavioural Finance in Retirement****,* AllianzRetire+ - Natalie Philips To best understand how and why individuals make decisions about their finances, and in particular, their retirement, we must consider the behavioural factors behind those decisions before we can even begin to address the more technical and product-specific dimensions of retirement. This session is the crucial first step for any adviser who wishes to provide specialised retirement advice. **Estimated CPD areas:** Client Care and Practice, Professionalism and Ethics, General **Registration link:** https://attendee.gotowebinar.com/register/4891581427797614429
30 mins	**Break**
Session 2 AWST 10:15am ACST 11:45am AEST 12:15pm	***Emerging Technologies and Opportunities for Financial Services****,* HUB24 How will emerging technologies like large language models, machine learning and AI provide opportunities for financial services professionals? What are the key demographic trends that will influence the use of emerging technologies? **Estimated CPD areas:** General, Client Care and Practice **Registration link:** https://attendee.gotowebinar.com/register/4411381818994299225
30 mins	**Break**
Session 3 AWST 11:30am ACST 1:00pm AEST 1:30pm	***Salary Packaging an Electric Car****,* Insignia Financial - Troy Smith New legislation enables salary packaging of certain Electric Cars, without incurring any Fringe Benefits Tax. This makes the arrangement extremely attractive for certain clients. In this session, we will review the rules and examine the nuances of the strategy, with a case study-based approach. **Estimated CPD areas:** Tax (Financial) Advice **Registration link:** https://attendee.gotowebinar.com/register/4491614281984754272
30 mins	**Break**
Session 4 AWST 12:45pm ACST 2:15pm AEST 2:45pm	***Adviser Must-knows: Intergenerational Wealth Transfers****,* AIA Australia - Ben Martin In this technical strategy/practice management session, we take financial advisers through the must-know high net worth intergenerational wealth transfer planning opportunities, with a focus on superannuation and property. This information can then be applied in practice to ensure robust and thorough discussions are taking place with both estate planning referral partners and indeed the next generation of family members that are in line to inherit the wealth and ultimately evolve into future clients of the practice accordingly. **Estimated CPD areas:** Technical Competence, Client Care and Practice, Tax (Financial) Advice **Registration link:** https://attendee.gotowebinar.com/register/6773757318061751126
AWST 1:30pm ACST 3:00pm AEST 3:30pm	**Close**

CENTREPOINT ALLIANCE

Virtual Masterclass

Day 2: Wednesday, 17 May 2023

Time	Description
10 mins before	**Arrival, technology check and welcome to Day 2** *Each webinar has its own attendance link which you will receive in the calendar invite upon registration for a webinar.* *Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.*
Session 1 AWST 9:00am ACST 10:30am AEST 11:00am	***Behavioural Finance of Risk Insurance***, MetLife - Jeffery Scott This session examines the various factors that positively and negatively impact the behavioural decision-making process of individuals when considering life insurance policies. It will provide both the theoretical and practical implications of how clients gather information and make selection decisions (purchase/lapse) in relation to risk insurance. **Estimated CPD areas:** Client Care and Practice **Registration link:** https://attendee.gotowebinar.com/register/591637742170229343
30 mins	**Break**
Session 2 AWST 10:15am ACST 11:45am AEST 12:15pm	***Hack Attack***, Alphinity Global (Fidante) - Trent Masters Cyber security is one of the key focus areas for our discussions with businesses to understand the shape and advancement of their thinking around data and asset protection. From an investment opportunity point of view, cyber security spending is resilient with a handful of key players well positioned to benefit in a highly fragmented market. **Estimated CPD areas:** General **Registration link:** https://attendee.gotowebinar.com/register/6955762776342430805
30 mins	**Break**
Session 3 AWST 11:30am ACST 1:00pm AEST 1:30pm	***Implications of Investor Behaviour in Volatile Markets***, Dimensional Fund Advisors – Eleanor Kirkpatrick and Christian Newtown Dimensional explores how emotions influence decision making, how even objective ideas are subject to individual perception, and how money can influence cognition. Participants will leave with a fresh perspective on news and markets, as well as five key investor lessons for dealing with uncertainty. **Estimated CPD areas:** Client Care and Practice, General **Registration link:** https://attendee.gotowebinar.com/register/275845908045151577
30 mins	**Break**
Session 4 AWST 12:45pm ACST 2:15pm AEST 2:45pm	***Education and Wealth Transfer,*** Futurity Investment Group - Damien Otto In this session, you will learn how you can offer your clients a flexible and tax-effective solution to education funding and estate planning certainty. We will demonstrate how education bonds can assist your clients with strategic solutions across wealth creation, tax-paid investing, planning and investing for the future costs of education, and securely passing on wealth to future generations. You will leave this session with an increased knowledge of the mechanics of education bonds and when they are appropriate to use in client strategies to improve your clients' financial outcomes. **Estimated CPD areas:** Technical Competence, Tax (Financial) Advice **Registration link:** https://attendee.gotowebinar.com/register/4446185760060006742
AWST 1:30pm ACST 3:00pm AEST 3:30pm	**Close**

CENTREPOINT ALLIANCE

Virtual Masterclass

Day 3: Thursday, 18 May 2023

Time	Description
10 mins before	**Arrival, technology check and welcome to Day 3** *Each webinar has its own attendance link which you will receive in the calendar invite upon registration for a webinar.* *Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.*
Session 1 AWST 9:00am ACST 10:30am AEST 11:00am	***Can the housing market pull the economy down?,*** Russell Investment Management - Alexander Cousley With interest rates having risen globally, and most housing markets having seen some weakness, worries about property have started to rise. Whilst there are risks for certain economies, we discuss our reasoning for our belief that the decline in the housing market is not likely to cause a severe contraction in the global economy. **Estimated CPD areas:** General **Registration link:** https://attendee.gotowebinar.com/register/870619026509207130
30 mins	**Break**
Session 2 AWST 10:15am ACST 11:45am AEST 12:15pm	***Super Tax above $3 million and Quality of Advice Report Review,*** Macquarie Group - David Barnett and Will Moloney Please join us for this virtual session with Macquarie's David Barrett and Will Moloney as they examine the recent Government announcements regarding the proposed additional 15 percent tax on earnings of superannuation balances in excess of $3 million and the Quality of Advice Review (QAR) final report recommendations, including the potential impact on financial advisers in the industry today. **Estimated CPD areas:** Tax (Financial) Advice, Technical Competence, Regulatory Compliance and Consumer Protection **Registration link:** https://attendee.gotowebinar.com/register/7264674966212655450
30 mins	**Break**
Session 3 AWST 11:30am ACST 1:00pm AEST 1:30pm	***Cyber Crime and Fraud Awareness,*** BT Financial Group Fraud is seen in many different forms with varying levels of complexity, and it can be difficult to know exactly what to look out for. This session will outline measures you can take to avoid fraud-related financial crime so you can protect your information and that of your clients. **Estimated CPD areas:** General, Client Care and Practice **Registration link:** https://attendee.gotowebinar.com/register/3998206239997123928
30 mins	**Break**
Session 4 AWST 12:45pm ACST 2:15pm AEST 2:45pm	***Why wellbeing is what clients want,*** MLC Life Insurance - Marshall Ross Everywhere you look there are more and more different Insurer wellbeing offerings in the current market. These programs offer an opportunity for advisers to leverage their benefits to enhance their client experience. In this session, we look at global research into wellbeing and life insurance along with behavioural finance to ascertain how advisers can use these offerings to enhance client buy-in and ongoing engagement. **Estimated CPD areas:** Client Care and Practice **Registration link:** https://attendee.gotowebinar.com/register/8686423765275875159
AWST 1:30pm ACST 3:00pm AEST 3:30pm	**Close**