Brisbane Professional Development Day | 25 July 2024

Victoria Park | Ballroom
309 Herston Rd, Herston QLD 4006

Session time	Session title	Presenter	Company
8.30 – 9.00 am	Registration and Arrival	Tea/Coffee	
9.00 – 9.10 am	Welcoming Address	Ben Donohue Regional Manager	WT Financial Group
9.10 – 9.40 am	Group Update/Q&A Session	Keith Cullen Managing Director	WT Financial Group
9.40 – 10.20 am	**Adviser's Alpha** Our Adviser's Alpha® research quantifies the value of financial advice across emotional, financial, and portfolio dimensions. This session will explore both tangible and intangible benefits to clients, emphasizing how understanding investor preferences enhances the human element of advice. Learn to scale your advice through automation and digitization, capture its full value, and effectively communicate your value proposition. Discover tools and resources to articulate and elevate the services you offer.	Libby Newman Investment Specialist – Strategy and Research	Vanguard
10.20 – 10.40 am	Morning Tea Break		
10.40 – 11.20 am	**Return of real return investing** Real return investing isn't new. It has been in Australia for nearly 20 years, gaining peak popularity post-Global Financial Crisis. With many share markets hitting all-time highs, should we refocus on real return investing and its benefits for clients? This session will revisit the fundamentals of this approach, explain why the current investment environment is different, and its implications for these portfolios.	Nick Dowle Senior Consultant, Investment Specialist	MLC Asset Management

11.20 – 12.20 pm	**Enhancing Advice Efficiency with AI and Automation** Join a moderated panel discussion on leveraging generative AI and process automation in financial advice practices. Learn practical strategies and gain valuable lessons from peers who have successfully adopted AI, helping you to optimize your own advice delivery and stay at the forefront of technological advancements in the industry.	**Adviser Panel Moderated by Frank Paul**	
12.20 – 1.20 pm	**Lunch**		
1.20 – 2.00 pm	**The not-so-scary world of risk advice** This session will examine some common myths around personal insurance risk and compliance. We'll cover real-world data on complaints, outcomes, and disputes to give you confidence in your advice. You'll also learn ways to seamlessly de-risk the advice process and eliminate unnecessary steps.	**Marshall Ross** **Partner Education Manager**	**MLC Life**
2.00 – 2.40 pm	**Supercharged Superannuation: Unlocking the power of platform ownership** Explore the game-changing potential of platform ownership in superannuation. This session covers its impact on estate planning, taxation, and insurance. Key themes include seamless transfer of benefits, tax optimization, and comprehensive protection through integrated insurance. Gain insights and strategies to leverage platform ownership for maximum client benefits and navigate the complexities of the superannuation environment. Stay ahead with the latest trends and best practices.	**Scott Hoger** **National Manager, Education and Partnerships**	**TAL**
2.40 – 3.00 pm	**Wrap-Up | End of Day**		
3.00 – 4.00 pm	**Please join us for drinks**		

To attend in person please register your attendance at:

Brisbane PD Day In-Person Registration

To watch all sessions via livestream and participate in Q&A remotely please register your attendance at:

Brisbane PD Day Live Stream