Brisbane Professional Development Day | 31 July 2025

Victoria Park | Ballroom
Herston Rd, Herston QLD

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 – 9.55 am	**Death & Taxes – Tax considerations in Risk Advice** Tax efficiency is a critical component of life insurance advice. Whether it's premiums, claims payments, or even fees, tax is always an area of key concern for clients. In this session we consider funding strategies, structural considerations and claims outcomes in risk advice through a tax lens while considering the impact of TD 2024/7 on risk advice fees.	**Marshall Ross** **Partner Education Manager**	**Acenda**
9.55 – 10.40 am	**Adviser Portfolio Trends** This session will explore the insights and trends observed from an extensive series of comprehensive analytics and discussions with advisers. It will provide advisers with insights as to how their peers are constructing portfolios, and Vanguard's views regarding some of these trends and dynamics.	**Libby Newman** **Investment Specialist**	**Vanguard**
10.40 – 11.00 am	**Morning Tea Break**		
11.00 – 11.45 am	**Staying the course, the key to better retirement outcomes** This session will compare short-term vs long-term investment risks, explore the benefits of taking more risk over longer timeframes, examine how poor investor behaviour can impact outcomes, and share practical techniques for managing market risk to help clients stay on track toward their goals.	**Victor Huang** **Principal**	**Milliman**

11.45 – 12.45 pm	**Advice Teamwork: Adviser + Support Roles That Just Work** Explore how two advice practices have structured their teams for maximum efficiency and client impact. This session unpacks how advisers, paraplanners, and support staff work together to deliver advice faster and with consistency. Learn how to define clear roles, delegate effectively, and implement workflows and tools that enhance accountability and improve the overall client experience.	**Adviser Panel Moderated by Keith Cullen**	
12.45 – 1.45 pm	**Lunch**		
1.45 – 2.30 pm	**Ethical Dilemmas – Embracing Imperfection** This session explores the ethical dilemmas that financial advisers frequently encounter when helping clients with their insurance needs. While these dilemmas do not always have a clear-cut solution, following a structured decision-making process can guide advisers toward the most ethical course of action. The session introduces a methodology designed specifically for resolving these dilemmas in insurance advising.	**Scott Hoger** **National Manager – Education & Partnerships**	**TAL**
2.30 – 2.50 pm	**Group Update**	**Keith Cullen** **Managing Director**	**WT Financial Group**
2.50 – 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