



# Praemium Business Solutions Conference

STAR CITY, SYDNEY |  
10 MARCH 2010 |

 **præmium**  
*Praemium pro factis*

8.00 **Registration**

8.45 – 9.00 **Opening remarks – Chair**

*Warren Gibson, Præmium*

9.00 – 9.30 **Session 1 – Plenary**

**Independent economic overview – Don Stammer**

Don Stammer likes to point out that he has been alive for 31% of the European settlement of Australia and that he is currently enjoying his fourth career. The first career was as an academic, teaching economics and finance at the Australian National University. Then came a decade at the Reserve Bank, followed by twenty years as chief economist/director of investment strategy at Deutsche Bank and its predecessor Bain & Company. Don is now a non-executive director, including Chairman of Præmium Limited, and an independent economist providing weekly insights into the economy and the investment markets.

9.30 – 10.00 **Session 2 – Plenary**

**Where to advice? Lessons from international markets for advisers fine tuning the positioning of their business – Paul Resnik, FinaMetrica**

A 40-year veteran of the financial services industry Paul will deliver in his typical direct and independent style a SWOT analysis of the major Australian players. Specifically he will review a 2009 Financial Ombudsman's determination which gives a clear path linking investments to clients needs to illustrate the benefits and risks of advisers personalising their service offering. Paul is a co-founder of FinaMetrica, which assesses financial risk tolerance, and has recently spent time in Asia, UK, Europe and the US talking with clients.

10.00 – 10.30 **Session 3 – Plenary**

**Pricing your advice and getting it right – Sue Viskovic, Elixir Consulting**

Author of Elixir Consulting's Adviser Pricing Models Research Report, Sue Viskovic is an expert on pricing financial advice in Australia. Her qualitative study into how advisers are charging their services and what they are charging is the first of its kind. Elixir Consulting interviewed over 120 financial advice firms, large and small, and representatives in every state to compile a comprehensive report that details 15 different models. This session will overview her report and raise important considerations for every financial planner along with some practical solutions to address the challenges that will arise.

10.30 – 11.00 **Morning tea**

11.00 – 11.45 **Session 4A – Breakout**

**What do you need to deploy technology?**

This session deals with resourcing your business to cater for new technology. The old adage applies, no pain, no gain, but does it have to be a lengthy or painful experience?

*Aaron Dunn, Outlook Financial Solutions*

*Robert Cumming, HNW Planning*

**Session 4B – Breakout**

**What are the key issues in running a successful SMSF advisory business?**

Post GFC, the SMSF space has received a lot of attention as a potentially attractive segment of the market from which to grow your practice. In this panel session you will hear from a range of SMSF experts, including advisers who have built a successful SMSF practice, on what are the key areas to cover off on when positioning yourself as a successful adviser to the SMSF market. In particular this session will focus on the importance of aligning yourself with experts to enhance your value proposition to the SMSF client. You will also be given the opportunity to ask questions as they relate to your practice or the SMSF space in general.

*Ben Smythe, Heffron*

*Danny Mewett, Heffron*

*Bruce Christie, Centric Wealth*

*Andrew Sherlock, Sherlock Financial*

Disclaimer: This information is of a general nature and does not take into account your personal circumstances, financial needs or objectives. While Præmium Australia Pty Limited AFSL 297956 and its related entities ('Præmium') endeavour to provide accurate and timely information Præmium do not guarantee that the information is accurate at the date it is published or that it will continue to be accurate in the future. Before acting on any information, you should consider the appropriateness of it and the relevant product having regard to your objectives, financial situation and needs. In particular, individuals should seek independent financial advice and read the relevant Product Disclosure Statement or other offer document prior to acquiring a financial product.

11.45 – 12.30

## Session 5A – Breakout

### Communication & client engagement

Before you undertake a big trip you plan your itinerary. So too with your business you put yourself in your clients shoes, develop your value proposition, align your marketing message with that proposition, get all your stakeholders (staff and advisers) on board and finally communicate that to your clients and prospects.

*Scott Brownbill, Brownbill Consulting*

## Session 5B – Breakout

### Challenging “Best Practice”

Ever listened to a conference speaker and thought – “sounds good in theory but that just wouldn’t work in my business”? This interactive presentation pulls apart some of the widely-espoused concepts about ‘best practice’ methods of how to run a financial planning business, and allows the audience to discover some myths, and challenge some long-held beliefs. Participants will take away a new perspective on practice development and some new insights that they can apply to their business.

*Sue Viskovic, Elixir Consulting*

12.30 – 1.30

## Lunch

1.30 – 2.15

## Session 6A –Breakout

### Universal Wrap – Panel

What is a Universal Wrap and how can you apply this in your business?

*Martyn Rose, Morgan Stanley Smith Barney*

*Stephen Parker, E\*TRADE*

*Arthur Naoumidis, Praemium*

*Andrew Varlamos, Powerwrap*

## Session 6B – Breakout

### G geared investment strategies for SMSFs

With more than \$200 billion in SMSFs, representing about 23% of the total superannuation pool in Australia and over 50% of that in direct equities, gearing into SMSFs via instalment warrants will likely become more popular as markets continue to recover and confidence rebuilds. This session examines this as a strategy for this growing market of SMSFs.

*Brian Collins, Quantum Warrants*

*David Busoli, Cavendish*

2.15 – 3.00

## Session 7A –Breakout

### Strengthen your core business and outsource the rest

It is easy to get caught up in detail and spend valuable time doing non-core work in your business. The smart money sticks to their knitting and outsources non-core to those who can scale it. Valuable resources (personnel and money) can then be re-deployed into building core areas. Our speakers will examine the ins and outs of outsourcing whilst maintaining a high level of compliance.

*Brett Walker, SMART Compliance*

## Session 7B –Breakout

### Strategy SMAs – the future

Separately Managed Accounts, whilst not taking the market by storm, possess the hallmarks of the future of investing and meet the demands of investors head-on. Lower cost, transparency, portability, tax effectiveness, flexibility (customisation) and broad exposure across equities, multi-currency, fixed interest and property are all desirable features of SMAs. They are not two-headed monsters but simple investment vehicles driven by complex technology that delivers a scalable solution into the hands of financial advisers whilst eliminating one level of administration cost that exists in the wrap world.

*James Langlands, BlackRock*

*Arthur Naoumidis, Praemium*

3.00 – 3.30

## Afternoon tea

3.30 – 4.45

## Session 8 – Plenary (Panel)

### Successful business transitions – how we did it

No theories, just straight talking from practice principals on how they went about transitioning their business. These advisers will share their pain and talk about the hurdles they faced, the costs involved, the time it took and finally the benefits they and their clients now enjoy.

*Ray Griffin*

*Greg Eden, Eden Wiseman*

*Patrick Canion, RMG Financial Services*

4.45 – 5.00

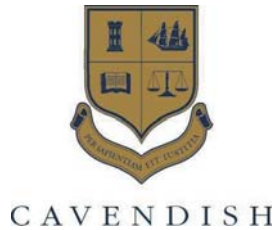
## Closing remarks

5.00 – 6.30

## Networking drinks

## Proudly sponsored by:

### Gold sponsors



MorganStanley  
SmithBarney

### Silver sponsors



BGL.

BLACKROCK

Heffron  
Rely on our  
Excellence



EXTRADE  
AUSTRALIA



## Our media partners:

Money Management

Financial Standard  
a Rainmaker Information company

## Praemium Business Solutions Conference

**Praemium Ltd** Level 1, 406 Collins Street, Melbourne VIC 3000

Please return by: Fax: 03 8622 1200 or mail.

## Delegate registration

### Delegate details

First Name: \_\_\_\_\_

Surname: \_\_\_\_\_

Organisation: \_\_\_\_\_

Your Praemium Service Number (if applicable): \_\_\_\_\_

Address: \_\_\_\_\_

Suburb: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Fax: \_\_\_\_\_

Dietary requirements: \_\_\_\_\_

## Name badge

Preferred name: \_\_\_\_\_

Preferred company name: \_\_\_\_\_

## Industry Category

- |                                                       |                                                         |                                                  |
|-------------------------------------------------------|---------------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Financial Planner            | <input type="checkbox"/> Paraplanner                    | <input type="checkbox"/> Fund Manager Employee   |
| <input type="checkbox"/> Accountant                   | <input type="checkbox"/> SMSF Specialist                | <input type="checkbox"/> Broker                  |
| <input type="checkbox"/> Industry Supplier            | <input type="checkbox"/> Practice Manager/Support Staff | <input type="checkbox"/> AFS Licensee/Management |
| <input type="checkbox"/> Other (please specify) _____ |                                                         |                                                  |

## Payment

The cost for each delegate to attend this Conference is \$50 (inclusive of GST).

### Payment Method:

- Cheque Please make all cheques payable to **Praemium Limited**, and return it together with this registration form to:  
**Julie Butler**  
**Praemium**  
**Level 1, 406 Collins Street**  
**Melbourne VIC 3000**

- Direct Credit BSB: 033 055 Account Number: 185867 Account Name: Praemium Limited

Please ensure that you include the following information: **BSC (Your Name)**

- Credit Card

## Credit Card Details

Type of credit card:  Visa  MasterCard  Amex

Name on Credit Card:

Credit Card Number: - - -

Credit Card Expiry Date: / 20

Amount: \$

Praemium will not record or store the credit card information provided above. The information provided in this table will be handled in accordance with the *Privacy Act 1988* and the *National Privacy Principle* and destroyed in a safe and secure manner once payment is approved.

Signed:

Print Name:

Date: / / 20

## Terms and Conditions of Registration & Privacy Statement

By signing this registration form, I consent to the collection, use and disclosure of the information provided in this registration form in accordance with and for the purposes set out in the Privacy Statement below, and agree to abide by the terms and conditions contained in this registration document.

### Terms and Conditions:

1. Praemium Limited ABN 74 098 405 826 (Praemium) reserves the right to alter this program or presenters without further notice, however the program is intended to run as advertised. Praemium reserves the right to cancel or postpone the Praemium Business Solutions Conference (the 'activity') due to insufficient numbers – registrants will be notified if this occurs. 2. Registrations for the activity must be accompanied by full payment. Registrants will be liable for payment in the event of non-attendance unless cancellation has been made pursuant to clause 3 of these terms and conditions. 3. Registrants can cancel their registration for the activity no more than 5 business days prior to the activity. Refunds will not be granted if a registrant fails to cancel their attendance at the activity 5 business days prior to the activity. 4. Registrants who wish to send a substitute to the activity in their place should advise Praemium 5 business days prior to the activity.

### Privacy Statement:

Praemium Limited ABN 74 098 405 826 (Praemium) protects the privacy and security of the information provided by you. By completing this registration form, you agree to the use of your personal information by Praemium to: process your registration, to contact you about products & services, to disclose to third parties such as to Praemium Business Solution Conference sponsors, exhibitors, supporters or service providers, and for internal purposes. For more information about Praemium's privacy policy please visit <http://www.praemium.com.au/privacy-policy.html>. If you do not want your personal information provided to Praemium Business Solutions Conference sponsors, exhibitors, supporters, or service providers please opt out below.

### Tax Invoice:

This registration form becomes a tax invoice for GST purposes upon completion.

I do not want my personal information to be provided to Praemium Business Solutions Conference sponsors, exhibitors, supporters or service providers.

Signature:

Date: