

Demystifying SMAs

A practical seminar on Separately Managed Accounts

**Are you going to the FPA National Conference this year?
Get into the swing of the Gold Coast a day early and join
Præmium for this practical seminar which will de-mystify
Separately Managed Accounts.**

Hear directly from some of Australia's SMA thought-leaders to discover how you can use SMAs in your own business and how they fit into client's portfolios.

DATE: Wednesday 19th November 2008

LOCATION: Watermark Hotel
3032 Surfers Paradise Blvd
Surfers Paradise, Queensland, 4217

TIME: 2:00 – 5:00 pm

There is no charge to attend this seminar.

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AGENDA: Wednesday 19th November

2:00 – 2:15 Welcome & introduction

2:15 – 2:45 Improving client retention post sub prime

Paul Resnik. Principal, Paul Resnik Consulting Group



The financial world is in turmoil. Most clients will be confused and anxious about what the changes mean to them. Do they have to change their plans, their portfolios or worse still, are they considering changing their adviser? Paul Resnik will explain:

- How you can pro-actively review your client's needs
- How an SMA can overcome some of the disappointments with managed funds
- How SMAs fit into a client's portfolio

2:45 – 3:15 SMAs...an innovators delight

Richard Fabricius. Chief Operating Officer
Fat Prophets Funds Management Australia Pty Ltd



With Fat Prophets' SMA portfolio having got to a strong start in it's first year, Richard Fabricius explains:

- How you can use innovation to build your business
- How SMAs let you be an innovator
- The Fat Prophets experience to date

3.15 – 3.30 Afternoon Break

Places are limited, so book your seat by contacting Præmium on rsvp@praemium.com.au or 03 8622 1264.

3:30 – 4:00 How the SMA works – a practical demonstration

James Maramis. Director, Præmium Australia Ltd



This session will provide an overview of Præmium's SMA system (rated by Investment Trends SMA as the leading SMA platform for the last two years) to demonstrate:

- The role of the Investment Manager
- Submitting new business
- Viewing a client's portfolio
- Customising a client's portfolio

4:00 – 4:30 Using SMAs to advise on strategies, not individual securities

Arthur Naoumidis. Group CEO, Præmium Ltd



Find out about future SMA developments that will make them more accessible than ever before; and help advisers to advise on strategies rather than stock-picking.

4:30 – 5:00 SMAs – Empowering Financial Planners

Andrew Varlamos. CEO, Powerwrap



New market entrant, Powerwrap, presents on:

- Using Powerwrap's SMA to focus on what you do best: providing value-adding advice
- Enable your clients to invest more efficiently

Powerwrap is a fully consolidated wrap platform, offering access to direct equities administration,

managed funds and, most crucially, SMA capability. Powerwrap will be fully operational in early 2009.

5:00 – 6:00 Cocktail Hour!



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