

AIOFP GOLD COAST CONFERENCE 2011 AGENDA

Wednesday, 19 October	
2:00pm onwards	<p>Arrival and check-in at your hotel</p> <p>Surfers Paradise Marriott Resort & Spa 158 Ferney Ave Surfers Paradise</p> <p>Telephone: 07 5592 9800 Fax: 07 5592 9888 Website: https://www.marriott.com.au/hotels/travel/oolsp-surfers-paradise-marriott-resort-and-spa/ AIOFP Booking Page: http://cwp.marriott.com/oolsp/aiofpconference2011/</p> <p>Breakfast at your hotel is not included in your registration fee, but a full buffet breakfast can be purchased for the discounted conference rate of \$27 per person including GST, in the Lagoon Restaurant.</p> <p>An imprint of your credit card for 'extras' e.g. room service, mini bar, telephone etc. will be required by the hotel.</p>
6.30–10.00pm	<p>Welcome function, Marriott Resort & Spa, Pool Pergoda</p> <p>Start your conference experience mingling with like minded professionals and catching up with friends whilst enjoying beautiful surrounds, food & drinks. All delegates, sponsors and partners are invited to attend. Dress – Smart casual</p>
Thursday, 20 October	
6:30am	Breakfast opens at your hotel restaurant
8.30-9.00am	Registration, Ballroom Gallery, Level 2
8.30–8:50am	<p>Members Only Ballroom, Level 2</p> <p>AIOFP Executive Director's Report, Peter Johnston, Executive Director, AIOFP</p>
8.50–9:00am	PCP Report , Peter Daly, Chairman AIOFP, Deputy Chair PCM
9:00-9.20am	FRC/Mercer Report , Rob McGregor, Chairman, FRC, Luke Fitzgerald, Mercer
9.20–9.35am	Asgard Report , Mark Aufderheide, National Head & New Business, Asgard Wealth Solutions
9.35-9.45am	PCP Risk Report , David Tilley, National Dealer Group Manager, AIA Australia
9.45-10.00am	PCP Trustee Report , Vince Parrott, Executive Director, CCSL Australia
10.00-10.15am	Coffee Break, Ballroom Gallery, Level 2
10.15-10.45am	FOFA Update , Bryan Ashendon, Asgard Technical Services
10.45-11.15am	What it Means for an Australian Model Portfolio , John Abernethy, Executive Director & Chief Investment Officer, Clime
11.15-11:55am	"Stairway to Heaven or Close to the Precipice" and "Investment Returns - Oh Where Art Thou?" , Michael Karagianis, MLC
11:55–12.30pm	Making Money in a Volatile Market , Justin Braiting, Director, Watermark Funds Manager of the listed Australian Leaders Fund

12.30-1.00pm	Working Lunch, Ballroom, Level 2 What ASIC Expects Your Practice to Look Like from a Compliance Perspective		
1.00-1.50pm	Delia Rickard Head of Advice ACT Regional Commissioner, ASIC	Julie Fewster Head of Adviser Investigations, ASIC	Trevor Clarke Senior Manager & Financial Advisor, ASIC
1.50-2.00pm	Portfolio Construction Brief, Rob McGregor, Chairman, FRC		
2.00-2.20pm	Fixed Interest Discussion Panel Panellists		
	Adam McKenzie Mercer		Grant Goodier The Term Deposit Shop
	Peter Dorrian Pimco		
2.20-2.50pm	Australian Equities Discussion Panel Panellists		
	Hik Chadirchi Ausbil Dexia		Nick Pashias Aviva Investors
	Paul Cuddy Bennelong Funds Management		Tom Millner BKI Investment Company
2.50-3.20pm	Australian Equities – All Weather Performers Discussion Panel Panellists		
	John Abernethy Clime		Chris Stott WAM
	Rhett Kessler Pengana		Justin Braitting Watermark Funds Manager of the listed Australian Leaders Fund
3.20-3.55pm	Australian Equities Income Discussion Panel Panellists		
	Geoff Driver DJW (AFIC)		Graham Smith State Street Global Advisors
	Andrew Tracey JB Were		Patrick Noble Zurich
3:55-4.10pm	Afternoon Coffee Break, Ballroom Gallery, Level 2		
4.10-4.40pm	International Discussion Panel Panellists		
	Drew Corbett BetaShares		Ric Ronge Pengana Capital
	Tom Keenan IShares		Ben Moore Russell Investments
4.40-4.55pm	Property Discussion Panel Panellists		
	Michael Karagiannis MLC		Brent Severino Pacific East Coast
4.55-5.30pm	Portfolio Construction Strategies, Andrew Reeve-Parker, FRC Committee Member		
5.30-6.00/20pm	At Leisure		
6:15/30-10:30pm	Dinner Meet in the hotel lobby at either 6.00pm or 6.20pm for bus transfer to the Bavarian Haus Restaurant , 41 Cavill Ave, Surfers Paradise. Dress – smart casual		

	Entertainment: Comedian, Dave Flanagan
Friday, October 21	
6:30am	Breakfast opens at your hotel restaurant Check-out and settle 'extras' accounts. Check out time is 11.00am.
8:30–8.45am	All sponsors and delegates are invited to attend Ballroom, Level 2 ETF's Explained , Graham Smith , Vice President, State Street Global Advisors
8.45-9.00am	FOS Procedural Changes , Alison Maynard , Investments, Life Insurance and Superannuation Ombudsman, FOS
9.00-9.15am	Market Valuations , Steve Prendeville , Director, Forte Asset Solutions
9.15-9.30am	Industry Fund Update , Ray Bailey , Manager, Local Super
9.30-9.50am	Effective Estate Planning Opportunities , Michael Phillips , CEO, Phillips Financial and Andrew Andreyev , Estate Planning Strategists
9.50-10.05am	Introduction to Property Referral , Brent Severino , Pacific East Coast
10.05-10.20am	Coffee Break , Ballroom Gallery, Level 2
10:20–10:40am	Aged Care – A Winning Solution for Facilities, Residents & Advisors! , Greg Roberts , Director of Estcare, Global Aged Care
10.40-10.55am	Agribusiness Investors will Keep Fighting for Accountability for Future Schemes , Ron Willemsen , Principal in Commercial Litigation, Macpherson & Kelley Lawyers
10.55-11.25am	Members Only An SMSF Solution , Stephen Karrasch , Head of Group Sales, OneVue
11.25-12.00pm	Microcap Investing , Tony Waters , Ausbil Dexia
12.00-12.15pm	Trustee Services , Stuart Korchinski , Diversa Limited
12.15-1.00pm	Member Discussion and Pre Lunch Drinks , Ballroom, Level 2
12:30–1:00pm	Pre Lunch Drinks , Ballroom Gallery, Level 2 All sponsors and partners are invited to attend
1.00–1:30pm 1.30-2.30pm	Lunch , Ballroom, Level 2 All sponsors, delegates and partners are invited to attend Where to Invest in the Next Two Years Mathew Jeremy , Managing Director, Caravel Consulting Services
2:30pm	Conference Closed

Agenda may be subject to alteration without notice.