

An Invitation...



PARAGEM
Dealer Services

Up to 4.5
CPD
Points

Leadership & Development Day

Confirmed speakers include the following leaders in their field:

DENIS BARLIN MANAGING PARTNER SBN LAWYERS

JIM STACKPOOL MANAGING DIRECTOR STRATEGIC CONSULTING & TRAINING

PETER DORRIAN HEAD OF GLOBAL WEALTH MANAGEMENT AUSTRALIA PIMCO FUNDS

STEPHEN WALSH HEAD OF RESEARCH WILSON HTM

ADRIAN ASHTON HEAD OF DISTRIBUTION LEVERAGED EQUITIES

**Register
Now**

Brisbane
18 May
BRISBANE
HILTON

Sydney
25 May
SYDNEY
HILTON

Melbourne
27 May
PARK HYATT
MELBOURNE

Enabling Advice without Conflict

With the GFC slowly coming to an end and Government reviews completing, this quarter addresses a number of key areas for consideration moving forward. We bring experts in the field of Finance, Technical Support, Regulatory Impact and Practice Management into one day of intense evaluation of the issues impacting planners. We also cover the new credit licensing requirements and margin lending changes and what ASIC is looking for.

- An overall review of markets and where to from here having regard to the technical analysis with chartists forecasting further capital erosion. What about Bond Markets in a portfolio and are you comfortable with their outlook?
- A leading edge session on client engagement and the fees based models emerging by author and industry wide expert Jim Stackpool. This follows the Governments latest regulatory change with commissions and Volume Bonuses and how it impacts advice.
- Succession Planning and Trusts - what's happened recently and where to from here for planners and clients. Denis Barlin one of Australia's premier experts, both a lawyer and accountant addresses this complex area and how it impacts planners now. A post budget technical review will be covered for changes impacting the above.
- Margin Lending has become a poor cousin as a result of how it was used in Storm and other enterprises. Adrian Ashton addresses what's happening in the new world, how margin lending is adapting and why it's still important in an advice model of the future.
- Small cap markets have shown remarkable resilience albeit selectively over the past 2 years. As portfolio construction is re-engineered to accommodate Managed Accounts with ETF's and Index Funds, advisers will need to consider carefully where to access alpha in a risk controlled manner in growth portfolios. Stephen Walsh identifies the successful strategies in this definitively research driven world.
- Margin Lending variations to Licences - what you can and can't do and where the credit licensing changes will impact SoA's and what advisers are authorised to do and say. Paragem compliance experts will address this and identify easy steps to progress.

To Register...



PARAGEM

Dealer Services

Leadership & Development Day

Up to 4.5
CPD Points

Packages (please tick)	Price	Monthly
<input type="checkbox"/> Current Contracted Client		
<input type="checkbox"/> Professional Development & Leadership Day · This Professional Development & Leadership Day only	\$500 + GST = \$550	
<input type="checkbox"/> Professional Development & Leadership Series · Attendance at all 2010 Professional Development & Leadership Days · Attendance at 2010 PortfolioConstruction Conference	\$1,950 + GST = \$2,145 p.a	\$210 p.m
<input type="checkbox"/> Professional Development & Leadership package · Attendance at all 2010 Professional Development & Leadership Days · Attendance at 2010 PortfolioConstruction Conference · Kaplan Training Material, Training Plan and Training Register for 2010	\$2,350 + GST = \$2,585 p.a	\$240 p.m

Event (please tick)

Brisbane
18 May

BRISBANE HILTON
190 ELIZABETH ST
BRISBANE 4000
COFFEE FROM 8.30AM

Sydney
25 May

SYDNEY HILTON
488 GEORGE ST
SYDNEY 2000
COFFEE FROM 8.30AM

Melbourne
27 May

PARK HYATT MELBOURNE
1 PARLIAMENT ST MEL-
BOURNE VIC 3000
COFFEE FROM 8.30AM

Delegate One

**please note that fees are per person*

Name: _____ Email: _____

Delegate Two

Name: _____ Email: _____

Organisation: _____

Email (for invoicing): _____

Address: _____

Postcode: _____

Telephone: () _____ Fax: () _____

A tax invoice and agenda will be supplied upon receipt of registration.
Payment is required prior to the event to confirm attendance. Cancellation received within 24 hours of the event will be billed the full amounts.

The Paragem Professional Development & Leadership Day is an educational program designed for development purposes only. It does not constitute legal or other professional advice and should not be relied on as such. Participants should seek their own professional advice on the consequences of applying the information presented at the Professional Development & Leadership Day to specific circumstances. The content of the educational program is current as at the date of the Professional Development & Leadership Day.

Participants should make their own inquiries to determine whether their attendance at the Professional Development & Leadership Day satisfies their continuing professional development obligations under the relevant laws, ASIC Policy and the requirements of any applicable industry association.

Neither Paragem Partners, Paragem Holdings, nor the presenters shall be liable for any loss incurred by a participant, acting on the information provided at the Professional Development & Leadership Day.

To Register: : info@paragem.com.au Fax: 02 9026 0499 Ph: 1300 722 100
www.paragem.com.au