CENTREPOINT ALLIANCE

May 2025

Professional Development Day

Time	Description
8:45am	**Arrival and registration**
9:00am (10 mins)	**Focused Spotlight Video #1**
9:10am (45 mins)	**Securing the Future: Navigating Intergenerational Wealth Transfer** Baby Boomers will be transitioning $4.9 trillion over the next 10 years. In this session, we will explore how our award-winning investment bonds and investment-linked lifetime annuities are unrivalled estate planning and retirement income vehicles, empowering you and your clients with greater control to transfer their wealth to the next generation with certainty, whilst maximising retirement income. During this session, we provide practical and flexible strategies on how Generation Life’s Investment Bonds can provide tailored and unique estate planning features to help your clients transfer wealth to the next generation tax-effectively, with the ability to choose when and how their wealth transfer occurs. Presenter: **Generation Life** Estimated CPD areas: Technical Competence
9:55am (45 mins)	**Beyond Alpha** Alpha is often seen as the ultimate goal in investment management, but does it tell the whole story? This session goes beyond alpha to uncover the critical portfolio levers that shape successful multi-asset portfolios. We’ll discuss how advisers can elevate client outcomes by considering broader investment factors and addressing the evolving expectations of modern clients. What do clients really want from advisers today—and how can the current investment landscape help you exceed their expectations? Presenter: **PM Capital** Estimated CPD areas: Technical Competence, General
10:40am (20 mins)	**Morning tea break**
11:00am (10 mins)	**Focused Spotlight Video #2**

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11:10am (45 mins)	**Tax and Super Blind Spots Impacting Risk Advice.** Benjamin Martin will unpack the tax planning fundamentals that emerge across the life cycle of a super owned insurance policy - from setup, paying premiums and dealing with claim proceeds. The ability to identify the tax planning elements of risk advice will not only ensure recommendations are technically sound but also be key for those practices reviewing fee/revenue models off the back of TD2024/7: tax deductibility of financial advice fees. Presenter: **Ben Martin, AIA** Estimated CPD areas: Technical Competence
11:55am (10 mins)	**Focused Spotlight Video #3**
12:05pm (45 mins)	**Business Benchmarking – Top 10% of Firms** In this session, we will detail results of in-depth interviews conducted with Centrepoint's top practices. Areas covered include adviser demographics, staffing, revenue profile, fees, client demographics, growth and technology adoption. We will also provide high level practice trends on across our entire network, so you are able to assess what is happening more broadly in terms of fees and client growth. Presenter: **Paul Cullen and Tanya Seale, Centrepoint Alliance** Estimated CPD areas: General
12:50pm (40 mins)	**Eat and greet** As well as grabbing a bite to eat, why not find someone new to meet and share your personal passion and a practice highlight?
1:30pm (10 mins)	**Focused Spotlight Video #4**
1:40pm (45 mins)	**Is Volatility Back with a Vengeance?** Q1 of 2025 has seen a return of equity market volatility. Russell Investments will put the recent volatility into historical context, as well as look at some of the rotations that are happening underneath the headlines. They will discuss what to monitor for signs that a more protracted downturn is coming and discuss the outlook for the defensive allocations within a portfolio. Are government bonds still going to be defensive, or do investors need to be considering alternatives? Presenter: **Russell Investments** Estimated CPD areas: General

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2:25pm (10 mins)	**Focused Spotlight Video #5**
2:35pm (45 mins)	**Navigating the Superannuation Maze: Mastering Caps, Balances, and Tax Strategies** Join the Centrepoint Alliance Technical team for an engaging and insightful presentation where we unravel the complexities of aspects of superannuation. We will demystify the indexation of the transfer balance cap, the interactions between the transfer balance cap and total superannuation balance, in addition to providing practical tips for managing personal tax deductible contributions. Finally, we'll explore strategies to avoid inadvertent tax consequences of untaxed superannuation benefits, ensuring your clients' financial plans remain robust and compliant. Presenter: **Melinda Bendeich (Gold Coast, Brisbane, Melbourne, Adelaide, Perth) and Peter Kelly (Sunshine Coast, Newcastle, Sydney, Canberra), Centrepoint Alliance** Estimated CPD areas: Technical Competence, Tax (Financial) Advice
3:20pm (10 mins)	**Wrap-up and close**