

Wednesday 26 July 2017

4:30pm Welcome drinks and early registration

Thursday 27 July 2017

8.15am Registration and coffee

9.15am Welcome and Introduction

Matthew Quinn, Chairman, Class

9.30am Catching the Wave: Turning Opportunity into Reality

Kevin Bungard, CEO, Class

Accountants now realise they have a huge opportunity to transform and grow because of the wave of technological and regulatory change hitting the industry. But how do they actually go about exploiting these opportunities? This session turns theory into practical strategy and a plan of action.

10.00am Keynote: The Future of Superannuation and Work

The Hon Bernie Ripoll

We think we know what the future holds for superannuation and our jobs - that is, super will continue to grow and work will change of course, but it won't affect us today. Few people ever see change coming until it hits them in the back of the head and it's too late.

11.00am Morning tea

Morning tea

Morning tea

Stream 1

Industry & Business A

Stream 2

Industry & Business B

Stream 3

Class Technical & Support

11.30am Insights from the Good Bad Ugly Report 2017

Brad Geelan, Business Development Manager, Business Fitness

Learn the key insights from the Good Bad Ugly benchmarking study and Insight polls, including what actions firms are implementing to grow profits, technology software trends plus what is next on the radar for the profession.

Managing the Super Reforms with Class

Peter Vassilakis, Product Owner, SMSF, Class

Class is implementing a range of exciting features to help our clients successfully manage the Super Reforms. Come to this session to learn about the specific features Class has introduced, what enhancements are coming, and how to use them most effectively to cut the administrative burden on your business.

Class Support Clinics

11.30am: Investor Access Tools (Beginner)

*Find out how to activate and use Class investor access tools such as client view and the mobile app. **Matthew Bogacz, Service Delivery Manager***

11.50am: Document Management (Beginner)

*See how to reduce the administrative burden of storing and managing documents using the powerful document management system in Class. **Ibrahim Semerci, Implementation Consultant***

| | | | |
|---------|--|--|---|
| 12.15pm | Platforms Love Accountants. Really! Kelly Power, Head of Platforms, BT Financial Group <i>Platforms have not traditionally catered for accountants but traditional models won't work going forward. Kelly looks at how smart platform providers must build links to embrace and support the accounting industry. We look at how the platform market is changing, the growth of IMAs/SMAs and why non-aligned platforms are challenging existing players.</i> | Your Essential Guide to the Super Changes Brad Eppingstall, Director, RSM Australia <i>An insightful technical session on a range of hot topics related to the super changes, using practical scenarios to illustrate impacts and considerations. The most significant legislative changes to the super system in a decade create several opportunities and traps for practitioners in advising their clients.</i> | Class Support Clinics 12.15pm: Super Reform Features in Class (General Audience) <i>An in depth look at how to implement key strategies and procedures in Class including CGT relief and TBC compliance, as well as tips to help you manage the Reforms. Kevin Zhang, Compliance & Technical Services Manager</i> |
| 1.00pm | Lunch | Lunch | Class Support Desk Drop by with your questions about Class |
| 2.00pm | Learn How to Sell Yourself Wayne Schmidt, Founder, KarbonHQ <i>Accountants tend not to be natural marketers, but they have to learn how to survive in an increasingly competitive industry. This session will teach you how to identify the skills and points of difference that make you a valuable, marketable product and how to use modern marketing tools like social media to get an edge in the marketplace and impress potential clients.</i> | The ATO's Plans for SMSFs Kasey Macfarlane, Assistant Commissioner, ATO <i>The latest on the ATO's plans for reforming the reporting and regulatory environment for SMSFs, including the move towards real time reporting of transactions and the government's 2016 Super Reforms. This session will tell you the rationale and goals behind these changes and how the ATO will assist the accounting industry to meet the new requirements.</i> | Partner Integration Showcase 2:00pm: SMSF Life Insurance Reviews Brett Wright, Director <i>Removing the insurance litigation risk for accountants who provide compliance services to SMSF clients.</i> 2:20pm: Stockspot Stirling Mortlock, Head of Partnerships <i>How accountants are using robo advice.</i> |
| 2.45pm | The Macro View of the SMSF Industry Michael Blomfield, CEO, Investment Trends <i>Research on the SMSF market finds accountants are facing an increasingly serious challenge for the SMSF administration business – but many are rising to that challenge. In this session, find out how the SMSF market is changing, including the growth of multidisciplinary firms, how the Super Reforms are changing market dynamics, what your competition is doing to protect their share and the key findings on client needs that show which services accountants should be focusing on.</i> | Get Closer to your Clients with Investor Access Tools Sean McNeill, Head of Advisory Services, Future Assist; Joel Smith, Sales Director, Class <i>Clients and investors have come to expect information on demand - understandably they are seeking better, more convenient access to the details of their SMSF wealth. In this session we will look at how you can use Investor Access Tools to boost your value to your clients, strengthen relationships and improve the efficiency of those interactions. Hear from one firm how it has successfully implemented these tools in its business.</i> | Class Support Clinic 2.45pm: Using the Power of Class Consoles (Intermediate) <i>Learn how to process more regularly and how to update transactions across your business at regular intervals. Setup transaction rules across multiple portfolios, access new transactions from all your portfolios in one place. Tony O'Brien, Feeds Support Manager; Shane Brierley, Support Analyst</i> |
| 3.30pm | Afternoon tea | Afternoon tea | Class Support Desk Drop by with your questions about Class |
| 4.00pm | Case Study: How FINDEX Moved to the Cloud Belinda Murphy, Senior Manager SMSF, FINDEX; Joel Smith, Sales Director, Class <i>Last year national accountancy group FINDEX signed the largest single contract for cloud-based SMSF software services with Class after evaluating competing services. This session examines FINDEX's experience, the lessons learned along the way on how to execute an effective and efficient migration and the company's plans for the future.</i> | Fractional Investing: Giving Investors a Piece of the Action Anthony Millet, CEO, BRICKX <i>Fractional investment is bringing investment in traditional assets like residential property to a new class of investor. It can also have implications for how the markets for these assets operate. This session looks at how fractional investment works in the property market, opportunities and strategies for investors and how the industry will develop.</i> | Class Support Clinic 4.00pm: Getting Started with Class (Beginner) <i>New to Class? Come to this session to find out how to get the best start possible: how to use the member console, setting up data feeds, auto journaling and more. Shiam Ahmed, Implementation Consultant</i> |
| 4.45pm | Networking drinks | | |
| 6.30pm | Conference Dinner | | |

Friday 28 July 2017

| | | | |
|---------|---|---|--|
| 8.30am | Coffee & networking | | |
| | Stream 1 Industry & Business A | Stream 2 Industry & Business B | Stream 3 Class Technical & Support |
| 9.00am | The Cyber Crime Invasion Karen McDonald, Associate Director, Accountancy Insurance <i>A wave of cyber crime is targeting Australian businesses, accountants in particular, and the threat is growing. Understand the current state of cyber crime in Australia, learn about the most common threats and find out what you can do to minimise the risk to your firm.</i> | Super Reforms: The Post July 1 Landscape Meg Heffron, Head of Customer, Heffron SMSF Solutions <i>Compliance with the July 1 rule changes is just the beginning. This session explores the strategies for keeping your SMSF clients within the new boundaries and ensuring they have the right plan in place to minimise the downside of the changes and maximise the chances they will meet their retirement savings goals.</i> | Class Support Clinics 9.00am: Investor Access Tools (Beginner, Repeat) <i>Find out how to activate and use Class investor access tools such as client view and the mobile app. Matthew Bogacz, Service Delivery Manager</i> 9.20am: Moving from ELS to PLS (General Audience) <i>The days of lodging client returns with ELS are numbered as the ATO moves to phase out the system. See how to use the new PLS system in Class. Kevin Zhang, Compliance & Technical Services Manager</i> |
| 9.45am | Personal Wealth: How the Game is Radically Changing Chris Ridd, CEO, myprosperity <i>While cloud computing dominates small business accounting software, the Personal Wealth industry has seemingly missed the digital wave. Chris Ridd, former Managing Director of Xero Australia, shares his observations on how the game of Personal Wealth is radically changing in terms of demographics, client expectations and the use of technology.</i> | Panel: The Future of AI and Machine Learning in Accounting Tim Mannah, Servian; Al Bentley, Simply Wall St; Associate Professor Richard Xu, UTS; Jacqui Henderson, Adviser Intelligence; Bob Groneman, Class <i>Do androids dream of electronic spreadsheets? As data volumes explode and processing speeds increase, more firms will use machine learning and artificial intelligence to drive efficiency and competitive advantage. The panel explores how these trends will impact the accounting and financial services industries and how business will use AI to gain the edge.</i> | Class Support Clinics 9.45pm: Customised Reports (Beginner) <i>See how easy it is to create customised letters, minutes and other documentation in Class. Rebecca Ricketts, Training & Education Manager</i> 10.05am: Super Reform Features in Class (General Audience, Repeat) <i>In depth look at implementing key strategies and procedures in Class including CGT relief and TBC compliance, plus tips to help you manage the Reforms. Kevin Zhang, Compliance & Technical Services Manager</i> |
| 10.45am | Morning tea | | Class Support Desk Drop by with your questions about Class |
| 11.15am | Will the Super Reforms Wreck Your Estate Plans? Craig Day, Executive Manager, Colonial First State <i>The new restrictions in the Super Reforms come with some nasty traps for the unwary that could turn your legacy into a millstone for your beneficiaries. The new rules will prompt many SMSF members to re-examine what happens to their super on death, or in the event of a disability or terminal illness. Find out how the reforms will affect your existing estate plan and how to ensure its intentions are honoured.</i> | The Trends Guiding Software Development at Class Joe Nalewabau, Chief Product Officer, Class <i>This session will cover some major trends that are on the mind of the Class CPO and how that may affect the product plans for Class Super and Class Portfolio. Regardless of whether the change is short, medium or long term, this is a great opportunity to understand the context behind product thinking at Class.</i> | Class Support Clinic Using the Power of Class Consoles (Intermediate, Repeat) <i>Learn how to process more regularly and how to update transactions across your business at regular intervals. Setup transaction rules across multiple portfolios, access new transactions from all your portfolios in one place. Tony O'Brien, Feeds Support Manager; Shane Brierley, Support Analyst</i> |

| | | | |
|---------|---|---|--|
| 12.00pm | What's New in Class Super Peter Vassilakis, Product Owner, SMSF, Class <i>Class Super has undergone major changes in the past year – not only due to the Super Reforms but also as Class exploits the increasing power of the cloud to enhance functionality and connect it with more services and data sources that further boost the efficiency of your business and improve your service capability. Come to this session to find out how you can take advantage of these new features.</i> | Data Mining: Insights from the Class SMSF Benchmark Report Kevin Bungard, CEO, Class <i>Digitisation and the huge growth of financial data open important new insights for businesses, and the SMSF sector is no exception. This session looks at some of the unique information that has come from analysing SMSF data in the cloud and its potential to improve portfolio administration and drive higher business growth and profitability for accountants.</i> | Class Support Clinic Class Tips & Tricks (General Audience) <i>Learn about the less well known features and shortcuts in Class that will turn you into a Power User. Sayed Mansoor, Senior Support Analyst</i> |
| 12.45pm | Lunch | Lunch | Class Support Desk Drop by with your questions about Class |
| 1.45pm | Leadership in Professional Practice: The Missing X-Factor Matthew Rowe, CEO, Countplus <i>There are four cornerstones to success in professional practice: planning, people, systems and leadership. This presentation focuses on what is considered the most important and yet most misunderstood cornerstone – leadership. Come and hear why a professional practice will never outperform the leadership that guides it.</i> | Aligning Investment Outcomes with Client Values Leah Waldie, Head of Client Relationships, Australian Ethical Investment <i>Ethical investment options have doubled in the past 3 years and continue to grow at a rapid pace. Is ethical investing only about screening the negative or can it make a positive contribution to the future? And does investing ethically mean compromising on the returns from your investments? This session will provide an overview of ethical investing in Australia and what is driving its rise in popularity.</i> | Partner Integration Showcase 1.45pm: Andy O'Meagher, Managing Director, Act2 Solutions <i>Actuarial certificates and ECPI - what's changed and what hasn't.</i> 2.05pm: Josh Golombick, Co-Founder, Plenty Plus <i>Obtaining SMSF advice for clients online quickly, easily and at a very low cost.</i> |
| 2.30pm | Managing the Super Reforms with Class (Repeat) Peter Vassilakis, Product Owner, SMSF, Class <i>Class is implementing a range of exciting features to help our clients successfully manage the Super Reforms. Come to this session to learn about the specific features Class has introduced, what enhancements are coming, and how to use them most effectively to cut the administrative burden on your business.</i> | Transform Portfolio Management with Class Portfolio Joe Nalewabau, Chief Product Officer, Class <i>The administration of non-SMSF portfolios such as trusts is still a heavily manual task for many accountants and well behind adoption of the cloud compared to SMSFs. Find out in this session how to bring Class Super-like levels of efficiency to the administration of non-SMSF portfolios with Class Portfolio.</i> | Class Support Clinic Getting Started with Class (Beginner, Repeat) <i>New to Class? Come to this session to find out how to get the best start possible: how to use the member console, setting up data feeds, auto journaling and more. Shiam Ahmed, Implementation Consultant</i> |
| 3.15pm | Panel: Boosting Your Worth to Clients With Class Partners Joel Smith, Class; Chloe Ward, Superfund Wholesale; Kerry Bosnich, Perks; Richard Smith, ASF Audits; Doug McBirnie, Accurium; Amreeta Abbott, NowInfinity <i>A major advantage of the cloud is plugging your business into a partner ecosystem to offer your clients a wider variety of products and services and boost your value proposition. But how to do this efficiently and get maximum value from the integration? This session brings together Class partners and experienced cloud users.</i> | Case Study: How We Enhanced Our Value Proposition with Class Portfolio Greg Mifsud, Goodwin Financial Services; Joe Nalewabau, Chief Product Officer, Class <i>Join us for this interactive session with Goodwin Financial Services to learn how this long established Sydney practice uses Class Portfolio to deliver an efficient and client friendly administration and reporting service for companies, trusts and individual portfolios.</i> | Class Support Clinic Document Management (Beginner, Repeat) <i>See how to reduce the administrative burden of storing and managing documents using the powerful document management system in Class. Ibrahim Semerci, Implementation Consultant</i> |
| 4.00pm | Conference close - Coffee & Networking | | |