

Sunday 16th September 2018

4:30pm Welcome drinks and early registration

Monday 17th September 2018

8.15am Registration and coffee

9.30am Welcome and Introduction
Kevin Bungard, CEO, Class

9.45am Plotting a new course for the wealth accounting industry
Kevin Bungard, CEO, Class

As the industry emerges from a lengthy chapter of legislative change, practitioners should now have the time and headspace to explore new business opportunities, and give considered thought to what they would like their practice of the future to look like.

In this thought provoking session, Kevin will look at some of the interesting possibilities that surround us and lie ahead, including new business models, key industry trends and the likely impact of some of the industry initiatives already underway.

Drawing on real-life references of practices who are already on the path to doing things differently and driving great customer experience through innovation and change, this session is set to deliver lots of thought points on how we can all plot a new course into the future.

10.15am Keynote: Reflections on the Royal Commission and likely changes
Chris Cuffe, Company Director & Investment Professional

The Royal Commission into misconduct in the Banking, Superannuation and Financial Services Industry has caused endless debate and questioning around how such a highly regulated industry could descend into such turmoil. As industry and consumers come to terms with the fallout, the focus is now starting to pivot to the future. How can an industry shaken up by a publicly exposed catalogue of misdemeanours start to regain credibility and trust? What changes can we expect across legislative framework and industry practices?

Chris Cuffe, a highly respected figure in the wealth management industry, will share insights on the learnings of the Commission to date and his perspective on the likely changes ahead.

11.00am Morning tea

11.30am ATO plans for SMSFs for the next 12 months

Dana Fleming, Assistant Commissioner SMSFs, ATO

Dana will present three key points in her session. First, a broad level overview of upcoming government initiatives (3 year audit, 4-6 members and SMSF rollovers) and an insight in how we are preparing to administer these. Second, a discussion on industry trends and feedback. This will cover the ATO's work in new risk assessment and compliance strategies to deal with mischief and promoters, in addition to a discussion on the upcoming statistics to be published by the ATO. Finally, Dana will present an insight of the regulatory role going forward – looking over the ATO's future plan in context of how the Superannuation Future Client experience plan fits within. Here Dana will address technology and whole of government initiatives, which are all elements which will play part in shaping the SMSF experience in the future.

12.15pm SMSF Strategies for 2018/19

Meg Heffron, Head of Customer, Heffron SMSF Solutions

1 July 2018 brings several new opportunities and challenges for SMSFs. Downsizer contributions, "catch up" concessional contributions, and 2017/18 annual returns have a brand new set of rules around segregation. This session looks at how these changes affect the strategies available for SMSF members and their advisers.

1.00pm Lunch

Lunch

Class Support Desk

Drop by with your questions about Class

	<i>Stream 1 Industry & Business A</i>	<i>Stream 2 Industry & Business B</i>	<i>Stream 3 Class Technical & Support</i>
2.00pm	How technology is driving behavioural change Dale Crosby, Senior Adviser, High Tech Soft Touch <i>Achieving a real change in the way we do things is difficult at the best of times. Accounting firms are trying to become more value-focused in the way they engage with clients and deliver services, but individuals still behave largely as factory workers on production lines. In this session, we'll look at how a combination of neuroscience, analytics and technology can be used to drive real change across your firm.</i>	The sleeper issue in every SMSF...dealing with exit Tracey Besters, SMSF Design <i>100% of SMSFs will need to deal with the exit of a Member at some point in their lifecycle! With some 29% of SMSFs holding property, 43% of all members in receipt of an income stream and 33% of all members over 65; many SMSFs are on a collision course for some nasty outcomes. This session will consider the issues of exiting a member and how liquidity, managing the TBC/TBA and compulsory lump sum death benefits need to be addressed in our new super world. Tracey will also consider some strategies that could be employed now to help minimise the impact in the future.</i>	Class Support Clinic TBAR (General) <i>Learn how Class greatly simplifies TBAR event tracking and reporting and get answers to all your TBAR questions. Includes practical real-life scenarios and live demos. Kevin Zhang, Compliance & Technical Services Manager & Sha Sha, Senior Support Analyst</i>
2.45pm	Class Product Direction Joe Nalewabau, Chief Product Officer, Class <i>In this session, Joe will provide a glimpse into the Class product direction - what's influencing it and where it is heading. Discover what drives our product decisions, get valuable insight into how we plan and prioritise and find out what's in store for Class in the future.</i>	Identifying, discussing and managing Elder Abuse Liam Shorte, Director, Verante Financial Planning <i>Conservative estimates suggest at least 10 per cent of older Australians suffer from financial abuse and their own adult children are the most likely perpetrators. As their trusted tax/ accounting/ financial advice providers you're often one of the first to spot the warning signs. Real life examples, what to watch for, how and with whom do you deal with your concerns. This session provides proactive preventative measures.</i>	Partner Integration Showcase 2:45pm: Manish Sheladia, Founder, CloudOffis <i>Experience the future of audit process automation with CloudOffis – an SMSF audit platform powered by Auditomation</i> 3:05pm: Jim Hennington, CEO, A.S.A.P. Advice <i>Digital advice tools for accountants - increasing the value of your service through integrated advice solutions</i>
3.30pm	Afternoon tea		Class Support Desk Drop by with your questions about Class
4.00pm	Maintaining a profitable firm Daniel Jones, DMY Association <i>In this session, Daniel looks at ways to maintain and build a profitable firm, how to overcome hurdles through some case studies and how the metrics have changed on building a profitable firm.</i>	SMSF Sector Update Peter Hogan, Head of Education & Technical, SMSF Association <i>In this session, Peter Hogan will examine some of the more recent issues impacting SMSFs. This will include recent public releases from the ATO as regulator of the sector, pending or recently passed tax & superannuation legislation as well as other matters impacting the viability of the SMSF sector to deliver the retirement expectations of members.</i>	Class Support Clinic Class Tips & Tricks (General) <i>Learn about some of the less well known features and shortcuts in Class that will help turn you into a power user.</i> Kevin Cooper, Product Specialist & Alexis Smith, Support Team Leader
4.45pm	Networking drinks		
6.30pm	Conference Dinner		

Tuesday 18th September 2018

8.30am	Coffee & networking		
	Stream 1 Industry & Business A	Stream 2 Industry & Business B	Stream 3 Class Technical & Support
9.15am	Segregation and ECPI: getting it right Melanie Dunn, SMSF Technical Services Manager, Accurium <i>As part of the superannuation reforms implemented from 1 July 2017 the ATO revisited their position on segregated pension assets, impacting how an SMSF client must claim ECPI from 2017-18. This session will explain how to examine a fund's asset structure to correctly claim ECPI, and also what decisions can minimise tax and reduce complexity in light of ATO scrutiny.</i>	What's Class Portfolio? Portfolio management for trusts, personal, company & partnerships Joe Nalewabau, Chief Product Officer, Class <i>In this session, Chief Product Officer, Joe will show you how – with the same great data feeds and automated transaction processing of Class Super – you can use Class Portfolio to build efficiencies across your business, expand your revenue opportunities and get a whole of wealth view for Planners and clients with SMSF and non super investments.</i>	Class Support Clinics 9.15am: Moving to Periodic Processing (Intermediate) <i>Find out how you can streamline the move to periodic processing with Class, and what the benefits are. Includes best practice tips on preparing your practice to make the change.</i> Sebastien Brennan, Implementation Consultant 9.35am: Getting started with Class (Beginner) <i>New to Class? Find out how to get the best start possible, including best practice tips for streamlining the transition to Class, maximising your implementation period, and getting everything in place to process a first year fund.</i> Terese Gerges, Implementation Consultant
10.00am	A recap on a busy year - Class Super Paul Li, Product Manager, Super, Class <i>Paul will do a fast paced recap of new features added to Class Super over the last year, followed by a deeper dive into the Class functionality available to help you and your clients stay on top of Transfer Balance Account Reporting (TBAR) obligations, and easily handle Exempt Current Pension Income (ECPI) calculations.</i>	Panel: Future of platforms Connie McKeague, OneVue; Rob Hayward, Macquarie Wealth Management; Arnie Selvarajah, Belle Direct; Hosted by Toby Potter, Chair, Institute of Managed Account Professionals <i>This session will cover:</i> <ul style="list-style-type: none"> - What has driven the development of platforms for Australian SMSF investors? - What are the platform operators doing to make their administration systems more useful to SMSF trustees? - How are the platforms supporting SMSF trustees who want to blend advice and Do It Myself functionality? - What does the future hold for investors? 	Class Support Clinics 10.00am: How Class supports ECPI changes (Intermediate) <i>Here's your chance to get clarity on the new ATO guidelines around claiming ECPI - what it all means, how Class supports the latest changes, plus related updates to actuarial certificates integrations.</i> Philip Boadi, Transitions & Systems Compliance Manager & Julia Shi, Support Team Leader 10.20am: Achieving a whole of wealth view (General) <i>Find out how you and your clients can achieve a single view of wealth across SMSF and non-super investments with Class consolidated portfolio. Includes a demo of setting up a consolidated portfolio in Class and viewing it using Class client view and the mobile app.</i> Ragav Sitaraman, Product Manager - Partner & Ibrahim Semerci, Implementation Consultant
10.45am	Morning tea		
	Morning tea		
11.15am	Superannuation and Estate Planning William Fettes, Senior Associate, DBA Lawyers <i>William will run through the latest super and estate planning strategies, tips and traps following the major reforms that commenced in mid-2017. Advisers need to be on top of this area where most members have strategies and documents in place that are no longer appropriate and could cause substantial extra tax and lost opportunities.</i>	Upgrading SMSFs to more than two member Family Super Funds Grant Abbott, Director, I love SMSFs <i>The changes by the government to the number of members in a SMSF from four to six creates an enormous amount of possibilities, opportunities, strategies and of course potential pitfalls. The typical SMSF and SMSF trust deed is woefully inadequate for SMSF advisers looking to set up a true multi-generational SMSF. In this session Grant Abbott, author of "The Guru's Guide to SMSFs" explains what a Family Super Fund is, the five reasons they are infinitely better than a SMSF, how to upgrade a current SMSF to a Family SMSF, new documentation requirements and the critical importance of SMSF estate planning.</i>	Class Support Desk Drop by with your questions about Class Class Support Clinic 11.15am: Business Consoles (Intermediate) <i>Learn how to process more regularly and update transactions across your business at regular intervals. Set up transaction rules across multiple portfolios, and access new transactions from all your portfolios in one place. Including a live demo.</i> Shiam Ahmed, Principal Consultant

12.00pm	Future direction - Class Super Paul Li, Product Manager, Super, Class <i>Wondering what the future holds for Class Super? Join us to find out about some of the new product features Class has in store, including tools that will help you drive further business efficiencies, achieve deeper wealth insights and deliver a great client experience.</i>	Recommending an SMSF v Retail Super Neil Sparks, National Manager, SMSF Strategy, BT Financial Group & Bryan Ashendon, Head of Financial Literacy & Advocacy, Capability and Conduct, Advice, BT Financial Group <i>An SMSF may be the most appropriate structure but the integrity of Australia's world leading Superannuation system MUST come first. Neil investigates the current licensing regime and looks at 8 areas where Retail Super may see your clients in a better position, and you in "Safe Harbour", in a Best Interest universe.</i>	Class Support Clinic 12.00pm: Using APIs to extract Class data (Intermediate) <i>Find out how Class customers can set up access for APIs, where to access documentation and how to extract data from Class. Includes examples of the types of applications other Class users have developed.</i> Sayed Mansoor, Support Team Leader
12.45pm	Lunch	Lunch	Class Support Desk Drop by with your questions about Class
1.45pm	The recipe for a modern SMSF practice Aaron Dunn, CEO and co-founder, Smarter SMSF <i>The ingredients that make up the super reforms provide a fresh set of challenges for practitioners working with and engaging SMSF trustees. Changes due to the new TBAR requirements, a greater focus on client segmentation, a fresh approach to common strategies and a total re-think on estate planning are just some of the considerations that you need to understand and explore for your SMSF clients. In this session, Aaron identifies how SMSF business models are changing in this post-reform landscape and helps you to understand just what key ingredients you should be focusing on to deliver a recipe for success in your business.</i>	New beginnings - starting and growing an SMSF business with Class Super Kimberlee Brown, SMSF Director, H&R Block SMSF Solutions <i>H&R Block adopted Class Super in 2015 as the cornerstone for its new SMSF administration service. In this lively fireside chat, Kimberlee will chat to us about her role in leading the set up and growth of the SMSF service, and how Class Super has enabled the business to scale rapidly, deliver great client service and meet its internal business goals.</i>	1.45pm: The journey to professionalism <i>Rebuilding trust in financial advice starts with adopting an evidence-based approach, employing a client-first focus and forging strategic partnerships with people who share your philosophy. Hear insights from a pioneer in client-centric, value-based advice.</i> David Haintz, Global Adviser Alpha, brought to you by Dimensional
2.30pm	What your competitors are doing, how it affects you (and should you really care?) Glenn Poynton, Strategic Alliances Director, Class <i>Winning businesses don't just adapt to change – they lead it. Glenn will discuss some different approaches businesses are taking to tackle key trends and challenges around competition and client expectations; how Class is working with customers and partners to help deliver new and market leading wealth accounting solutions; and what you really need to care about, both now and into the future.</i>	Customer Success Story: Fireside chat Jordan Bevans, SMSF Operations Manager, Findex <i>Findex has been using Class Super since 2016 to drive profitable growth across its SMSF practice. In this lively fireside chat, Findex will share insights on its move towards delivering an integrated whole of wealth view; why successful collaboration between accountant, planner and end investor is critical to unlock value; the opportunity a Family Office strategy presents to advisers; and how technology will help to better service its clients in the future.</i>	Class Support Clinic 2.30pm: Data Feeds (Intermediate) <i>Data feeds form the bedrock of automation. Get all the details you need about feeds, including how to use the feeds console, troubleshooting and more. We'll also cover what ASAE 3402 is, and why it's important.</i> Tony O'Brien, Feeds Support Manager & Rebecca Ricketts, Training & Education Manager
3.15pm	Opportunities, conversation and a glass of wine Kevin Bungard, CEO Class & Michael Blomfield, CEO, Investment Trends <i>Grab a glass of wine and engage in some lively conversation with Kevin and Michael, as we wrap up another year of Class Connect. After a quick recap on some of the key highlights of the conference, they'll share their thoughts on where the strategic opportunities for the future really lie, drawing on industry research and benchmarking data. This is your last chance to arm yourself with some actionable insights you need to take your business into future, and to have your say and ask questions of Kevin and Michael. It's a session you really shouldn't miss.</i>		
4.00pm	Conference close		