8 SEPTEMBER

Welcome drinks and registration
Marble Bar
4:30PM

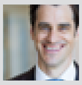
9 SEPTEMBER

Registration and coffee
8:15AM

Welcome and Introduction
Andrew Russell, Chief Executive Officer, Class
9:15AM

KEYNOTE: Building success on strong foundations
Brennon Dowrick, OAM
9:30AM

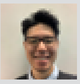
Success in life and business is something that is desirable to most people. How often do we dream of what a successful life would be like, but then not do anything about it? From a young age successful Australian Gymnast Brennon Dowrick was told that he was not the most talented athlete in his field. Early on he realized that in order to achieve the success he dreamed about he needed a plan. Brennon decided the best way to achieve success was to Build on Strong Foundations. Throughout his career Brennon set high goals, and then worked out the steps he needed to take to achieve them. Only when he had perfected one step would he allow himself to move on.



KEYNOTE: A demographic snapshot of Australia: now and towards 2020
Mark McCrindle, Social Researcher & Futurist
10:15AM

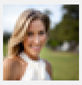
To engage with people and connect with communities, we need to understand the data and the demographics. Population analysis tells a fascinating story of Australia today and reveals clear trend lines. In this session, Mark uses the latest demographic data to give a snapshot of the changes, the trends, the challenges and the opportunities for your brand, organisation and sector.

Morning tea
11:00AM



KEYNOTE: What plans does the ATO have for SMSFs and future client expectations
Edward Chung, SMSF Future Client Experience, ATO
11:30AM

In this session Edward will address the ATO priorities and risk focus areas for SMSF. He will cover the annual statistics, new budget measures and how the ATO continues to work with government to make it easier for clients cutting red tape including changes to ECPI and actuarial. You'll hear about the current projects underway for SMSFs and how the ATO are investigating a modern replacement for eSAT and introduction of APIs to facilitate better client interactions between agents and the ATO using their own software.



KEYNOTE: The ultimate in resilience and mental health
Chelsea Pottenger, International Speaker. Ambassador for Mental Health
12:15PM

What if you could minimise stress in your life, be more productive and become a calmer, happier version of yourself. Would you jump at the chance? Of course, you would. In this session, Chelsea will empower you to take control of your mental and physical wellbeing, so you can live in the moment.

Lunch

Class Genius Bar Open
Drop by with your questions about Class
1:00PM

2:00PM

Stream 1

PANEL DISCUSSION
Crystal Ball or Know it All?

A panel discussion packaging up knowledge, sense and predictions on what the wealth accounting and advice future will really look like.

Moderator:
Glenn Poynton, Chief Strategy Officer, Class

Panelists:
Michael Blomfield, CEO, Investment Trends
John Maroney, CEO, SMSF Association
Kathy Evans, Senior Partner, Findex

Stream 2

Without capacity you're dead
David Smith, Director, Smithink

To be successful in your firm you need capacity. You need enough resources to ensure you can successfully and sustainable grow your business. You need skills capacity to ensure you can provide the expertise required by your clients. Capacity is driven by effective team structures, practice efficiency, recruiting and retaining the right talent and finding the right business partners to supplement your internal capacity.

This session will provide practical and pragmatic advice that you can immediately apply in your business to position your firm for success.

Stream 3
Class Technical & Support

The world of feeds
Dheeraj Sharma, Feeds Team Lead
Tony O'Brien, Senior feeds analyst

Bring your own laptop for this hands-on session where you will learn the benefits of data feeds as well as how to maintain a healthy feeds console across your whole business. We will also cover the most recent updates and enhancements to feeds.

SEPTEMBER 9

2:45PM

Stream 1

How to be seen as a 'go to expert' in your field

Alistair Marshall,
Director, Professional Services
Business Development

The session will focus on how to counteract the effects of static profits and ineffective marketing spend and demonstrate what it takes to stand out in an increasingly competitive marketplace. Many firms suffer from a lack of awareness, underperforming websites, no real point of difference from the competition, and partners and fee earners who consider themselves advisors rather than marketers or business developers. Session participants will learn how to engage potential clients without sounding confused or bland, and to build trust and credibility so they become the advisor/firm of choice over time.

Stream 2

PANEL DISCUSSION

How to attract & retain top talent

Leaders are facing increasingly fierce competition to attract and retain talent during a time when the 'global war for talent' is cited as one of the top risks being encountered by leaders. What can leaders do differently to attract and retain critical talent into their organisation? Join this panel discussion to hear from talent experts on how companies can find – and keep – the talent needed to help their business grow.

Moderator:
Jacqui Levings, Chief People Officer, Class

Panelists:
Will Blott, Founder, Principal, If How Now

Nikki Hobin, Founder & Director of Flourish Consultancy & FlexCareers Board Member

Dan Spencer, Principal, Derwent Recruitment

Stream 3
Class Technical & Support

Is your practice set up for success?
10 ways your business can maximise benefits from using Class.

Sebastien Brennan, Consultant, Class
Erol Kilic, Consulting Manager

This session draws on learning from Class Customer Success team and examines 10 key areas to ensure your practice will maximise the benefits from using Class. This session is for partners, mangers and super users who have been using Class for at least 6 months. It will also touch on healthcheck reports that will be available from the genius bar.

3:30PM

Afternoon Tea

Class Genius Bar Open
Drop by with your questions about Class

4:00PM

Stream 1

SMSFs - the past, the present and the future

David Busoli, SMSF Alliance

A light hearted look through the history book of SMSFs, and a reality check on what advisers and accountants really need to think about as they confront a new future.

Stream 2

The latest and hottest SMSF succession strategies

Daniel Butler, Director, DBA Lawyers

In this session, Dan will delve into the most recent trends in SMSF succession planning. He'll look at the importance of enduring powers of attorney and the latest changes, and the recent developments with binding nominations and reversionary (pension) nomination. He will also discuss the complicated scenario of how to survive a spouse who is both the deceased spouse's executor AND SMSF trustee/director and if they can pay themselves the deceased's death benefit, and much more.

Stream 3
Class Technical & Support

Tips & Tricks (basics)

Helen Wang, Support Analyst
Zahir Patel, Support Analyst

This hands-on session will teach you about some of the less well-known features and shortcuts in Class. Bring your laptop along and have a go as they show you the ropes.

4:45PM

Networking Drinks

6:30PM

Conference Dinner with Dave Hughes

10 SEPTEMBER

Coffee & networking — 8:30AM

Stream 1

9:15AM

What do clients really want? Tangible ways to make clients feel valued and help drive organic growth

David Clatworthy, Wealth Solutions Macquarie – Propensity Research

Macquarie draws on data from more than 10,000 end clients to unpack the relationship between best interest, trust and fees. This session draws on insights from Macquarie's Propensity Project to explore what drives client satisfaction – and what can increase clients' propensity to continue doing business with your firm, do more business with your firm and refer you to their family and friends.

10:00AM

How technology and robotic process automation can boost productivity

Ayhan Baba, CEO, MSA National

In this session Ayhan presents a Case Study illustrating how MSA National use technology and Robotic Process Automation (RPA) to eliminate repetitive manual tasks; increase productivity, speed & efficiency and reduce cost, risk & error while improving staff engagement and reducing staff turnover. See how digitally signed documents has improved turnaround times, eliminated errors, reduced risk and improved conversion rates.

Stream 2

WORKSHOP

Development the business model for a modern SMSF practice

Aaron Dunn, CEO & Co-founder Smarter SMSF

How well positioned is your business today to meet the ever-changing demands of your SMSF clients? Have you embraced new technology, but still apply old thinking to the completion of your client's work? Are you actively growing your SMSF client base? Is it becoming more difficult to keep up-to-date with the regulatory and client demands and, in more fee-sensitive environment?

In this hands-on workshop, Aaron Dunn help attendees to unpack many of these issues and build a strategy for a successful modern SMSF practice.

Taking insights from the Future of SMSF report and the 5 stages to an SMSF business developed by Smarter SMSF, attendees explore topics of service delivery (value proposition), pricing models, customer segments, client relationships and much more.

All designed to help you shape a smarter SMSF future!

Stream 3
Class Technical & Support

9:15AM

Tax Statements and EOFY Processing

Kevin Zhang, Technical Service Manager
Julia Shi, Senior Support Analyst

In this session, we will go through everything you need to know for the new tax statements automation solutions, how Class can potentially alleviate one of the key pain points for the year-end processing.

10:00AM

Hints and tips on Transfer Balance Account Reporting

Kevin Zhang, Technical Services Manager

In this session, we will run through the checklist for take-on funds, some of the key common issues related to TBAR and how to troubleshoot them.

Class & Security

Philip Boadi, Systems Compliance Manager

This session will detail some of the key measures Class has implemented to protect information on Class.

Morning Tea — 10:45AM

Class Genius Bar Open
Drop by with your questions about Class

11:15AM

Stream 1

Productivity - the healthy balance between people and technology

Michelle Hamer, Business Owner - Smart Advice Pty Ltd

There are many factors that influence why we are not achieving what we should with the tools we have around us, and in today's marketplace, productivity is achieved when we strike the healthy balance between people and technology.

In this session, Michelle will explore the factors limiting productivity, explain active procrastination versus procrastination, and provide insightful techniques to overcome barriers to productivity.

Stream 2

PANEL DISCUSSION

What does Class reimagined mean for you?

Andrew Russell, Chief Executive Officer announced to media in May 2019 a 'reimagine' strategy for Class. Join the newest members of the Class Executive Leadership Team (ELT) for an interactive discussion on what the 'reimagine' strategy means for existing customers of Class and the broader wealth accounting industry

Moderator:
Glenn Poynton, Chief Strategy Officer, Class

Panelists:

Andrew Russell, Chief Executive Officer, Class

Jason Wilson, Chief Product & Marketing Officer, Class

Jacqui Levings, Chief People Officer, Chief People Officer, Class

Dan Coutts, Chief Technology Officer, Class

Stream 3

PARTNER SHOWCASE

Cloudoffis SMSF Sorted

Clint Estavilla, Head of Sales

Find out how to cut preparation time in half and revamp your SMSF processes with the latest technology. This session looks at Class' latest partner collaboration with Cloudoffis SMSF Sorted, and how to drastically change the strategy and process behind the way SMSF compliance and preparation is performed.

Carisma Solutions

Prasoon Veerath, Head of Delivery, Carisma

Grow your Business with Carisma 360 degree SMSF Services and Extended Teams! Grow in the Cloud. Grow your firm's Productivity. Grow your Client Satisfaction. Come along to find out how.

SEPTEMBER 10

12:00PM

Stream 1

PANEL DISCUSSION

What Clients Value in Wealth Management

When SMSF clients seek wealth management advice, how do they judge the service they receive and its alignment with their personal goals? What else apart from raw investment returns do they want? Hear how leading advisers organise the management of client portfolios to create services client really value.

Moderator:
Toby Potter, Director, Philo Capital Advisers

Panelists:
Tom Collinson, Director, Wealth Management, Canaccord Genuity

Grant Chapman, Principal, Fintech Financial Services

Chris Mather, Head of Distribution, BT Open

Stream 2

WORKSHOP

Grant's top five SMSF strategies for 2019/2020

Grant Abbott, Director, I love SMSFs

We escaped a bullet with the re-election of the Morrison government. It is not time to be complacent but time to grow your number of clients and work more deeply with your clients. In this workshop, Grant Abbott who is celebrating his 25th year in SMSF advice, will bring his top five SMSF strategies for 2019/2020 to the table. These strategies will help to bring in new clients and two of the strategies will teach you how to build greater and more profitable relationships with your top 20% of clients. Buckle in and get excited about the possibilities and opportunities in the new world of SMSFs.

Stream 3
Class Technical & Support

PARTNER SHOWCASE

CCUBE

Mark Papendieck, General Manager, CCUBE

Take a look behind the scenes and find out why CCUBE is proving so popular with financial advisers who are looking for financial planning software to increase efficiency, decrease double data entry and of course integrate with Class.

MyWorkpapers

Kevin Bungard, COO and Australian GM, MyWorkpapers

With the UK's move to Digital Workpapers, what can Australia learn? Find out how the UK's "Digital Tax" initiative has accelerated practices there going online and paperless.

12:45PM

Lunch

Class Genius Bar Open
Drop by with your questions about Class

1:45PM

The signal and the noise

Andrew Inwood, Principal and Founder, CoreData

Unlocking the clues to success and delving into data to uncover financial services trends and future directions.

Categorising funds in retirement phase for ECPI

Melanie Dunn, SMSF Technical Services Manager, Accurium

From 1 July 2017, the exempt current pension income (ECPI) rules became more complicated than ever, and it might even be changing again from 1 July 2020. How you claim ECPI impacts on how a fund claims expenses and deals with capital gains and losses. This session will help you identify how different types of fund must claim ECPI and examine some of the complexities which continue to raise confusion when completing the annual return including, eligibility to claim ECPI, deemed segregation, and disregarded small fund assets.

Tips and tricks on pensions and property

Zahir Patel, Support Analyst
Helen Wang, Support Analyst

This hands-on session gives you handy tips and tricks for creating and managing pensions as well as processing property transactions.

2:30PM

The latest news on Class super

Paul Li, Product Manager - Super, Class

Class Super is dedicated to providing maximum value for accountants and administrators through automation and solving pain points within the SMSF administration process. This session will provide an outline of features and enhancements released over the last year including our groundbreaking Tax Statement Automation and the recently released Tax Statement OCR solution.

Changing the Conversation

Amreeta Abbott, CEO, NowInfinity

Amreeta will discuss NowInfinity's mantra of #changeishere focusing on innovation, technology and most importantly changing the conversation. Instead of just focusing on software and what it does, Amreeta believes that advisers have an opportunity to change the conversation they are having with their clients. Changing the conversation, opens a whole new world of revenue, relationships and longevity to the advisers business. Come along to find out more.

Partners & API

Ragav Sitaraman, Product Manager - Partner
Sayed Mansoor, Support Team Leader, Class

In this session you learn about API authorisation and security, and what you can access through Class' APIs. We will also cover scenario creation using Postman or Excel and how to get the credentials to access Class' APIs.

3:15PM

SMSF Strategies for 2019/20
Meg Heffron, Managing Director, Heffron SMSF Solutions

A new financial year always brings different strategic opportunities for SMSFs. A number of new contribution rules start having an impact from 1 July 2019 – what will they mean for clients? We're entering the third year of Transfer Balance Accounts, Total Super Balances and the rest of the 2017 super changes. What new insights are emerging as we settle into the new regime? In this session Meg will look to answer these tough questions.

4:00PM

Conference Close