# CONGRESS WORKSHOP PROGRAM OVERVIEW

| Time | Wednesday, 21 November |
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| 1:00pm-4:00pm | FPA Professional Practice workshop |
| 1:00pm-4:00pm | Paraplanner workshop |
| 4:15pm-5:55pm | Opening Keynote Session and FPA Awards presentation |
| 6:00pm | **Welcome reception and Expo opening** |
| Time | Thursday, 22 November |
| 7:30 am | Networking breakfast |
| 9:00 am | Keynote Session |
| 10:30 am | **Workshop 1:** Evolve / Engage / Grow / Inspire |
| 11:30 am | Morning tea |
| 12:10 pm | **Workshop 2:** Evolve / Engage / Grow / Inspire |
| 1:10 pm | Lunch |
| 2:10 pm | **Workshop 3:** Evolve / Engage / Grow / Inspire |
| 3:30 pm | Afternoon Tea |
| 4:10 pm | **Workshop 4:** Evolve / Engage / Grow / Inspire |
| 7:00 pm | **Future2 Celebration** |
| Time | Friday, 23 November |
| 7:15 am | Women in Wealth breakfast |
| 9:00 am | **Workshop 5:** Evolve / Engage / Grow / Inspire |
| 10:15 am | **Workshop 6:** Evolve / Engage / Grow / Inspire |
| 11:15 am | Brunch |
| 12:30 pm | Closing Keynote Session |
| 2:00 pm | Congress close |

# CONGRESS WORKSHOP SESSION PREVIEW

## EVOLVE

*Technical capability and critical thinking in financial planning specialty areas.*

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| **WORKSHOP 1**<br>**FASEA: The new standards explained** | An in-depth look at the new FASEA standards, covering education, code of ethics, exam, CPD and the professional year. |
| **WORKSHOP 2**<br>**Estate planning: Making sure no one gets left behind** | Peter Townsend will lead a workshop on scoping advice and engaging a specialist, successfully integrating intergenerational planning in your practice, and producing intergenerational strategies through SMSFs and trust structures. |
| **WORKSHOP 3**<br>**Managing conflict of interests** | This workshop will explore separating product from advice and what ASIC considers a reasonable fee structure to on-board and service a client. |
| **WORKSHOP 4**<br>**Not all is super: Developing non super strategies** | The opportunity to use super as the exclusive tax-effective structure to fund clients' retirement income needs has been eroded since the 1 July 2017 changes. This workshop will look at alternatives to the super structure to create wealth for your clients. |
| **WORKSHOP 5**<br>**Aged care: Blessing or burden?** | Hear about the range of residential options available to aged care clients and the need to consider these as part of the planning process, while a lawyer and aged care specialist planner will discuss an elder abuse case study. |
| **WORKSHOP 6**<br>**Navigating risk advice for your SME clients** | Planners can add real value in providing SME owners with succession solutions. This workshop will demonstrate how to assess the insurance needs of your clients and how to work with experts to secure appropriate buy/sell arrangements. |

## ENGAGE

*Engaging and developing your clients and staff.*

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| **WORKSHOP 1**<br>**Ethical Leadership – profits with principles** | Today, more employees want to work for organisations that have a purpose beyond profits. This session looks at the forces driving and hindering organisations from moving in step with changing societal expectations of corporate leadership. |
| **WORKSHOP 2**<br>**Winning battles, losing wars** | Sometimes it's our effectiveness in doing the small things that make us lose sight of the bigger values we're working towards. This session will look at the perverse connections between the immediate and the strategic, and how we can be better individuals by keeping an eye on the big picture, too. |
| **WORKSHOP 3**<br>**Planners are perfectly positioned to change the world** | Carl Richards CFP® wants to show planners how they can change the world, one conversation at a time. Changing the world is about building leadership, building trust and building influence at scale. By putting these three elements together, planners are ideally positioned to change the world. |
| **WORKSHOP 4**<br>**Client engagement and you** | Vicki Writer explains the intricacies of human thought and behaviour. You will learn the secrets of how to communicate more effectively with your clients, your staff and your peers; enabling you to transform the results you produce. |
| **WORKSHOP 5**<br>**Get MatchFit!** | Matchfit means being ready to play and compete at a consistently high level in sport. In the workplace, being matchfit means being able to effectively negate the biological decline of the body and brain post age 40, and continue performing at your best. Andrew May explains how to be matchfit. |
| **WORKSHOP 6**<br>**Win trust and influence** | In a time of unprecedented change, uncertainty and scrutiny, the spotlight has firmly turned on the financial planning profession. Anthony Laye explains how planners can regain the trust of consumers and help them build better financial futures. |

# CONGRESS WORKSHOP SESSION PREVIEW

## GROW

*These sessions will help improve the operational side of your practice.*

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| **WORKSHOP 1**<br>**Goals Based Advice: A movement or financial planning?** | This workshop will focus on how to build client-centric advice, including behavioural coaching and building trust. |
| **WORKSHOP 2**<br>**Fintech: Designing your business future** | This workshop will explore some of the latest fintech offerings and how they can be used in designing and developing a more efficient and profitable business. |
| **WORKSHOP 3**<br>**Building best practice advice** | Better understand your compliance obligations and best interest duties, develop evidence documented processes for your file notes, and prepare compliant and engaging SOAs. |
| **WORKSHOP 4**<br>**Succession planning: Buy, scale or sell?** | This workshop will provide guidance in re-evaluating your business model, due diligence when buying or selling, best practice when scaling your business, and funding options. |
| **WORKSHOP 5**<br>**AFSL: The reality of going it alone** | Better understand the AFSL process, a Responsible Manager's compliance obligations, the pros and cons of running your own AFSL, and consider ASIC's views on individual licensing. |
| **WORKSHOP 6**<br>**Cultivate your culture and connect with your people** | This session will explore leadership, flexible work practices, management of business risks, and the role of positive team engagement. |

## INSPIRE

*Get motivated and nurture your mind and body.*

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| **WORKSHOP 1**<br>**Change as a positive springboard to financial success** | Why are we scared to dream big? This session will examine the psychology of fear, and how what we think scares us, is really the rocket fuel to a brighter future. |
| **WORKSHOP 2**<br>**Finding Calm amidst the Chaos** | Experience and science tell us that mindfulness is not only an essential tool but also a framework to help cultivate the best in us. You will walk out with insight, tools and ways to find your calm in the midst of chaos. |
| **WORKSHOP 3**<br>**Era of empathy** | Central to any successful business is empathy. This workshop will help you develop the processes to enable you to build the relationships needed to be ethical, authentic and successful. |
| **WORKSHOP 4**<br>**Strategy in uncertain times** | Build resilience through scenario thinking, which recognises that businesses face multiple futures and the need to focus on building capabilities to adapt to these futures. |
| **WORKSHOP 5**<br>**Mindfulness and stress busting** | Learn about the neuroscience behind stress and anxiety, and walk away with four mindfulness tools: journaling, cognitive-behaviour therapy, growth mindset, and calming anxiety meditation. |
| **WORKSHOP 6**<br>**Ethics in Finance** | Clare Payne puts an ethical lens across finance, including the practices that can enhance trust and meet changing societal expectations. |

**Book your place today at fpacongress.com.au**