

# Insurance Roadshow

## AGENDA

Time	Description
8:50am	<b>Welcome</b>
9:00am (45 mins)	<p><b><i>Insuring the Uninsurable Client – Marshall Ross/Rob Draper/Janette Kelley</i></b></p> <p>While every client needs to consider personal risk mitigation as part of their financial plan, not every client may be able to access an easily underwritten retail insurance product due to health or occupation. Similarly, as life and risk needs evolve over time it may be hard to make appropriate changes to existing cover. In this session, we look at strategic solutions for clients who cannot be underwritten and tips of appropriately positioning these with the client.</p> <p>Presenter: <b>MLC Life</b></p> <p>Estimated CPD areas: <b>Technical Competence, Client Care and Practice</b></p>
9:45am (45 mins)	<p><b><i>Intrepid Insights – Adam Crabbe</i></b></p> <p>Over recent years, the superannuation industry has been working through an unprecedented period of transformation. Merger and acquisition activity has resulted in a reduction in super fund participants by as much as two-thirds since 2015, leading to varying outcomes for holders of group insurance. This period of change is driving more consumers to seek advice, with a survey commissioned by Zurich confirming superannuation advice and insurance planning are some of the most sought-after areas of advice. Intrepid Insights explores this shifting landscape and uncovers how group insurance product changes are proving increasingly valuable for retail insurance and wealth protection advice.</p> <p>Presenter: <b>Zurich Life</b></p> <p>Estimated CPD areas: <b>Technical Competence, Client Care and Practice</b></p>
10:30am	<b>Morning tea</b>
11:00am (90 mins)	<p><b><i>Income Protection – what do the “new” IDII definitions mean to your clients at claim time? – Dr Jeffrey Scott</i></b></p> <p>This workshop session examines the various definitions contained in income protection policies that have been issued from 1 October 2021 that were designed to comply with APRA IDII measures, and how these changes will impact the benefit payments to your clients at time of claim.</p> <p>Presenter: <b>MetLife</b></p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
12:30pm (60 mins)	<p><b><i>Risky Business – Scott Hoger</i></b></p> <p>Risk management goes beyond the underlying product. The product simply facilitates the advice. How a policy is owned can determine funding, tax and estate planning outcomes. This session will uncover how financial advisers can add significant value through tailored structural advice.</p> <p>Presenters: <b>TAL</b></p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
1:30pm	<b>Summary/close and lunch</b>