

## Virtual Masterclass

3, 4 &amp; 5 February 2026

## Day 1: Tuesday, 3 February 2025

Time	Description
10 mins before	<p><b>Arrival, technology check and welcome to Day 1</b></p> <p>Each webinar uses the Day 1 attendance link which you will receive in the calendar invite upon registration for Day 1. You can choose to attend all or only specific webinars.</p> <p><b>Important note:</b> Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.</p>
Session 1	<p><b>Unlisted Assets in Super: What Every Adviser Needs to Know</b></p> <p>Presenter: <b>Brighter Super</b></p> <p>Unlisted assets are increasingly part of superannuation portfolios, offering diversification and potential long-term returns. However, they also introduce unique challenges around valuation, liquidity, governance, and regulatory compliance. This session equips advisers with the knowledge and frameworks to confidently guide clients and meet fiduciary obligations when incorporating illiquid investments into super strategies.</p> <p>This session provides an overview of private markets and the importance of illiquid asset inclusion for diversification. We will cover Fund valuation principles and governance, including valuation integrity, liquidity management, and operational due diligence. Practical insights will help advisers understand risk disclosure, member communication, and strategic allocation to ensure compliance and client best-interest outcomes. Real-world examples and case studies will highlight diversification within sectors.</p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
15 mins	<b>Break</b>
Session 2	<p><b>Navigating 2026: Signals That Matter for Investors</b></p> <p>Presenter: <b>Schroders</b></p> <p>Cut through the chaos. Seb Mullins delivers Schroders' essential 2026 outlook, spotlighting the trends that will drive returns and the risks advisers cannot ignore. From US economic momentum and emerging market opportunities to AI valuations, gold's rally, and critical labour market shifts—this session delivers actionable insights for positioning client portfolios in an unpredictable year ahead.</p> <p>Estimated CPD areas: <b>General, Technical Competence</b></p>
15 mins	<b>Break</b>
Session 3	<p><b>Private Credit, Income, Liquidity, and the Modern Portfolio: Inside the Private and Public Markets Mix</b></p> <p>Presenter: <b>Ventura</b></p> <p>The 2026 Virtual Masterclass brings together a panel of leading global and domestic managers across fixed income, private credit, alternatives, and multi-asset investing for a forward-looking discussion on the most influential themes shaping portfolio construction today. Moderated by Daniel Stojanovski (CIO), this session examines how advisers can position portfolios to address questions around persistent dispersion, changing yields, maturing private-market cycles, and increased scrutiny on liquidity and portfolio resilience.</p> <p>Our panel of specialists, representing expertise across public and private markets, in both fixed income, private credit, and differentiated alternative strategies.</p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
15 mins	<b>Break</b>

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Time	Description
Session 4	<b><i>Estate Planning without Compromise</i></b>
AWST 12:15pm ACDT 1:45pm AEST 2:15pm AEDT 3:15pm	<p>Presenter: <b>Generation Life</b></p> <p>The ongoing reforms are the new norm in superannuation — making diversification more important than ever. More advisers are navigating uncertainty and helping Australians build resilient, intergenerational wealth with investment bonds.</p> <p>This session will explore:</p> <ul style="list-style-type: none"> <li>the impact Australia's evolving financial landscape may have on your clients</li> <li>how investment bonds can deliver estate planning without compromise – empowering advisers to offer clients unrivalled certainty</li> <li>strategies on how Generation Life's Investment Bonds compare with alternative structures outside of superannuation, such as company trusts and company structures</li> </ul> <p>The real opportunity lies in building a legacy that provides control, clarity and flexibility across generations.</p> <p>Estimated CPD areas: <b>Technical Competence, Tax (Financial) Advice</b></p>
15 mins	<b>Break</b>
Session 5	<b><i>Future-Proof Advice: AI, Cybersecurity, and the Human Edge</i></b>
AWST 1:15pm ACDT 2:45pm AEST 3:15pm AEDT 4:15pm	<p>Presenter: <b>Morningstar</b></p> <p>AI is transforming advice—streamlining operations, enhancing compliance, and improving client engagement. But efficiency must be balanced with trust and security. This session explores how advisers can adopt AI responsibly while safeguarding sensitive data, maintaining human connection, and avoiding common pitfalls. We'll share Morningstar's journey, practical applications, and research insights on where clients embrace AI—and where they push back.</p> <p>Estimated CPD areas: <b>Technical Competence, Client Care and Practice, General</b></p>
AWST 2:00pm ACDT 3:30pm AEST 4:00pm AEDT 5:00pm	<b>Close</b>

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## Day 2: Wednesday, 4 February 2025

Time	Description
10 mins before	<p><b>Arrival, technology check and welcome to Day 2</b></p> <p><i>Each webinar uses the Day 2 attendance link which you will receive in the calendar invite upon registration for Day 2. You can choose to attend all or only specific webinars. You can choose to attend all or only specific webinars.</i></p> <p><b>Important Note:</b> Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.</p>
Session 1 AWST 9:15am ACDT 10:45am AEST 11:15am AEDT 12:15pm	<p><b><i>Managing Risk with Confidence: Portfolio Risk Management in Managed Portfolios</i></b></p> <p>Presenter: <b>Quilla</b></p> <p>In today's dynamic investment environment, effective risk management is the cornerstone of delivering consistent outcomes and building client trust. This masterclass explores how managed portfolios provide a disciplined framework for identifying, monitoring, and mitigating portfolio risks. Participants will gain insights into:</p> <ul style="list-style-type: none"> <li>• The principles of portfolio risk management and why they matter in volatile markets.</li> <li>• How managed portfolios create consistency through structured rebalancing and diversification.</li> <li>• The role of transparency and governance in reducing adviser and client risk.</li> <li>• Practical strategies for aligning risk management with client objectives across different portfolio types.</li> </ul> <p>By the end of the session, attendees will understand how managed portfolios not only streamline operations but also strengthen resilience, ensuring advisers can deliver fair, consistent, and sustainable outcomes in an increasingly complex investment landscape.</p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
15 mins	<b>Break</b>
Session 2 AWST 10:15am ACDT 11:45am AEST 12:15pm AEDT 1:15pm	<p><b><i>From Macro to Meaningful: Turning Global Forces into Portfolio Outcomes</i></b></p> <p>Presenter: <b>Russell Investments</b></p> <p>Geopolitical tensions, supply chain shifts, and demographic divergence are redefining the global investment landscape. In this engaging session, Andrew connects these macro trends to tangible portfolio outcomes — showing how advisers can help clients translate global change into long-term opportunity. Expect an energetic and forward-looking discussion about converting insight into action.</p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
15 mins	<b>Break</b>
Session 3 AWST 11:15am ACDT 12:45pm AEST 1:15pm AEDT 2:15pm	<p><b><i>Death and Taxes – Tax Considerations in Risk Advice</i></b></p> <p>Presenter: <b>Acenda</b></p> <p>Tax efficiency is a critical component of life insurance advice. Whether it's premiums, claims payments, or even fees, tax is always an area of key concern for clients. In this session, we consider funding strategies, structural considerations and claims outcomes in risk advice through a tax lens while considering the impact of TD 2024/7 on risk advice fees.</p> <p>Estimated CPD areas: <b>Tax (Financial) Advice</b></p>

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Time	Description
15 mins	<b>Break</b>
Session 4	<b><i>SMSF Ethics – It's Not All About You</i></b>
AWST 12:15pm ACDT 1:45pm AEST 2:15pm AEDT 3:15pm	<p><b>Presenter: BT Funds Management</b></p> <p>When it comes to ethics and advice, there are many things to consider. However, in the SMSF space, it's not all about you. Whilst as advisers you do need to act in accordance with the Code of Ethics, you also need to consider the actions of your clients and determine are they at risk of behaving unethically. In this session we explore not only how the Code applies for SMSF practitioners but also explore biases that SMSF members may exhibit that could lead them down the ethical slippery slope.</p> <p>Estimated CPD areas: <b>Professionalism and Ethics</b></p>
15 mins	<b>Break</b>
Session 5	<b><i>Special Contributions</i></b>
AWST 1:15pm ACDT 2:45pm AEST 3:15pm AEDT 4:15pm	<p><b>Presenter: Macquarie</b></p> <p>This presentation delves into the rules for making special contribution that are separate from the non-concessional and concessional contribution caps. They contain separate rules and thresholds and can allow significant amounts to be contributed to super. The areas covered in this presentation are:</p> <ul style="list-style-type: none"> <li>• Small business CGT contributions</li> <li>• Personal injury contributions</li> <li>• Downsizer contributions</li> <li>• COVID-19 re-contributions</li> </ul> <p>Estimated CPD areas: <b>Technical Competence, Tax (Financial) Advice</b></p>
AWST 2:00pm ACDT 3:30pm AEST 4:00pm AEDT 5:00pm	<b>Close</b>



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## Day 3: Thursday, 5 February 2025

Time	Description
10 mins before	<p><b>Arrival, technology check and welcome to Day 3</b></p> <p><i>Each webinar uses the Day 3 attendance link which you will receive in the calendar invite upon registration for Day 3. You can choose to attend all or only specific webinars. You can choose to attend all or only specific webinars.</i></p> <p><b>Important Note:</b> Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.</p>
Session 1 AWST 9:15am ACDT 10:45am AEST 11:15am AEDT 12:15pm	<p><b>Granny Flat – Right or Wrong</b></p> <p>Presenter: <b>Insignia/MLC Technical</b></p> <p>The desire within families to provide care and support is now common between generations. One of the increasingly common strategies that advisers are considering is the concept of a granny flat right. In the right circumstances, a granny flat right can be a great way for families to provide each other with much needed care and support. However, in many cases, the desired outcome may be able to be achieved without entering into such a complex legal arrangement, and this strategy can be more like granny flat wrong. So, what do you need to know before you provide advice in this area? What are some of the tips and traps when discussing this option with clients? What are some of the alternatives, and how do you work through the considerations to help determine whether the benefits outweigh the costs? In this session, we cover:</p> <ul style="list-style-type: none"> <li>• The different types of scenarios which can be assessed as a granny flat right</li> <li>• The legal, tax, estate planning and social security implications</li> <li>• What should be covered formally in a granny flat agreement, who should be involved and when, and</li> <li>• A case study approach to bring to life how you can work through the net benefit of the proposed arrangement, and finally, whether it is granny flat right or wrong.</li> </ul> <p>Estimated CPD areas: <b>Technical Competence</b></p>
15 mins	<b>Break</b>
Session 2 AWST 10:15am ACDT 11:45am AEST 12:15pm AEDT 1:15pm	<p><b>Professional Standards: 2025 Wrapped</b></p> <p>Presenter: <b>Centrepont Alliance Professional Standards</b></p> <p>Join us for our year-in-review. We will replay the biggest trends in audit, client complaints, and adviser queries that defined the year. We'll share the key insights that shaped the year and practical tips to help you hit the right notes in 2026.</p> <p>Estimated CPD areas: <b>Regulatory Compliance and Consumer Protection</b></p>
15 mins	<b>Break</b>

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Time	Description
Session 3	<i><b>Riding the Wave of Super Caps and Balances in Retirement</b></i>
AWST 11:15am ACST 12:45pm AEDT 1:15pm AEDT 2:15pm	<p>Presenter: <b>Allianz Retire+</b></p> <p>As the retirement landscape evolves with new caps and shifting thresholds, advisers face more planning complexity. This session examines how super caps, balances, and market volatility interact to impact clients in the lead up to and then into decumulation. We provide a solid toolkit of tips and insights to help you get the most from contribution, retirement income stream, and estate planning strategies.</p> <p>Beyond the technical mechanics, we'll address the behavioural reality: clients' peace of mind isn't always tied to a wealth target. Explore layered income strategies—including account-based pensions, lifetime income and reserve management—that support client spending needs with resilient portfolio design.</p> <p>Estimated CPD areas: <b>Technical Competence, Client Care and Practice</b></p>
15 mins	<b>Break</b>
Session 4	<i><b>Beyond the Policy: Real-World Thinking in Lump Sum Protection</b></i>
AWST 12:15pm ACDT 1:45pm AEST 2:15pm AEDT 3:15pm	<p>Presenter: <b>AIA</b></p> <p>Positioning lump sum usually begins with a discussion around what would happen if the life insured were to pass away unexpectedly or became permanently incapacitated. This session dives deeper into analysing what features are imperative for your client versus the “nice to haves”. From the TPD Own v Any debate sustainability or where Trauma/Critical illness fits in, the session will give you greater confidence in weighing up what is the best fit for your client.</p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
15 mins	<b>Break</b>
Session 5	<i><b>Death and SMSF</b></i>
AWST 1:15pm ACDT 2:45pm AEST 3:15pm AEDT 4:15pm	<p>Presenter: <b>SuperConcepts</b></p> <p>When an SMSF is established, the focus is often on growth, but what happens when a member becomes incapacitated, passes away or decides to exit? In many cases, the end of an SMSF isn't a matter of choice, but circumstance. Whether due to health, death or changing priorities, it is important for trustees to understand when a fund should be wound up.</p> <p>In this session, we will explore real life scenarios that trigger the wind up of an SMSF and outline the legal, tax and administrative steps required. You will also learn how to avoid common mistakes when closing an SMSF.</p> <p>Estimated CPD areas: <b>Technical Competence</b></p>
AWST 2:00pm ACST 3:30pm AEST 4:00pm AEDT 5:00pm	<b>Close</b>