

# 2011 Annual Advice Roadshow

## Your Free Invitation

**Adelaide**  
**22 August**

**Perth**  
**23 August**

**Brisbane**  
**29 August**

**Melbourne**  
**31 August**

**Sydney**  
**2 September**



**“Delivering high quality low cost advice for life”**

Free for financial planners – fully catered – CPD Points will be allocated

[www.midwinter.com.au](http://www.midwinter.com.au) - 1300 882 938

On behalf of Midwinter's directors, I am pleased to invite you to **Midwinter's 4th Annual Advice Roadshow**. Our Advice Roadshow will be free for financial planners and will be a half-day program hosted in Perth, Adelaide, Brisbane, Melbourne and Sydney. Last year we attracted 1,360 financial advisers across Australia. **We expect to deliver a high quality and focused event** with CPD points allocated.

I hope you will join us at **Midwinter's 2011 Annual Advice Roadshow** where you will gain valuable insight into delivering high quality, low cost advice for life.



**Julian Plummer - Managing Director, Midwinter**

[Click here to RSVP](#)



**Matthew Esler – Executive Director, Midwinter**

Matthew is responsible for Midwinter's technical and strategy support to advisers

Matthew has over twelve years' experience providing technical and strategic advice to fund managers and financial advisers on a broad range of super, tax, investment, insurance and social security issues. Matthew regularly presents at professional development days and major financial services conferences throughout Australia, and is a representative of SPAA's regulatory committee.



**Jeremy Cooper - Chairman Retirement Incomes, Challenger**

Jeremy Cooper is Chairman, Retirement Income at Challenger Limited: a full-time executive role involving aspects of research, product development and public advocacy of Challenger's philosophies in a range of areas.

Jeremy is a lawyer by training with experience across a broad range of financial services disciplines. Prior to joining Challenger, Jeremy was appointed by the Australian Government to chair a wide-ranging review of Australia's superannuation system, now known as the 'Cooper Review'.



**Daniel Needham – Managing Director, Ibbotson**

Daniel is responsible for leading the Ibbotson Associates business in Australia, developing business strategy & overseeing its implementation to deliver best-possible investment outcomes and service levels to clients.

Daniel also manages the Investment team, which is responsible for capital markets, manager research, and portfolio management. He chairs the Ibbotson Investment Committee in Australia, and also sits on the Ibbotson Global Investment Policy Committee.



**Peter Hogan – Technical Manager, MLC**

Peter has been involved in the financial services industry for over 20 years, working in government, accounting, actuarial and financial services companies. He specialises in advising on insurance, tax and superannuation issues generally, assisting financial advisers and accountants with complex strategy and regulatory requirements.

Peter holds the position of Director on the National Board of the Self-Managed Super Fund Professionals' Association of Australia (SPAA).

**Praemium presenters include Peter Gianniotis (WA/SA), Gwen Chew (QLD), James Maramis (Vic) and Nat Fiennes (NSW)**

## ROADSHOW DATES AND VENUES

Adelaide	Monday 22nd August, Adelaide Pavilion, cnr South Terrace & Peacock Road, Veale Gardens
Perth	Tuesday 23rd August, Duxton Hotel, 1 St Georges Terrace
Brisbane	Monday 29th August, Hilton Brisbane, 190 Elizabeth Street
Melbourne	Wednesday 31st August, Hilton on the Park, 192 Wellington Parade
Sydney	Friday 2nd September, Sheraton on the Park, 161 Elizabeth Street

## ROADSHOW AGENDA

7:45am	Registration
8:00am	Welcome & Introduction - <b>Hot Breakfast Served</b> – <a href="#">Click here for breakfast menu details</a>
8:15am	<i>State of the Market</i> - Daniel Needham, Ibbotson
8:30am	<i>Providing quality strategy advice</i> – Matthew Esler, Midwinter
9:30am	<i>Insurance for life - Effective strategies in a changing world</i> – Peter Hogan, MLC
10:00am	<i>Portfolio Management to generate practice efficiency</i> – State Manager, Praemium
10:30am	<b>Morning Tea Served</b>
10:45am	<i>Turning technical education into implementation</i> - Matthew Esler, Midwinter
11:00am	<i>Effective use of income streams in portfolios</i> – Jeremy Cooper, Challenger
11:30am	<i>Demonstrating the value of advice</i> – Matthew Esler, Midwinter
12:15pm	<i>Investment strategy &amp; portfolio construction in a low cost world</i> – Daniel Needham, Ibbotson
12:45pm	Closing remarks
1:00pm	<b>Networking and Close</b>

## INFORMATION FOR ATTENDEES

Attendance is free for all financial advisers, para-planners & support staff. \$250 + GST for non-strategic partner staff (BDMs, PDMs etc).

Please note that if you do RSVP and fail to attend without notifying Midwinter you will be charged \$50 + GST for non-attendance. This is to ensure availability for those who do want to attend.

**CPD Points will be allocated**

Strategic Partners for the 2011 Midwinter Advice Roadshow are Ibbotson & Associates, Challenger, Praemium and MLC.

[Click here to RSVP](#)