



# PARAGEM

## Dealer Services

Up to 4.5  
CPD  
Points

## Leadership & Development Day

Confirmed speakers include the following leaders in their field:

DANIEL NEEDHAM - MANAGING DIRECTOR & CIO, IBBOTSON ASSOCIATES

ANDREW PEASE - CHIEF INVESTMENT STRATEGIST ASIA PACIFIC, RUSSELL INVESTMENTS

KEAT CHEW - HEAD OF TECHNICAL SERVICES, NETWEALTH INVESTMENTS LTD

BRIAN PERT - MANAGING DIRECTOR, PERT & ASSOCIATES

MATTHEW LOCK - CEO, ONEVUE PRIVATE

**Register  
Now**

**Brisbane**  
**1 March**  
BRISBANE  
HILTON

**Sydney**  
**6 March**  
MARRIOTT SYDNEY  
HARBOUR

**Melbourne**  
**8 March**  
PARK HYATT  
MELBOURNE

The agenda for the first Paragem Professional Development Day for 2012 is hard hitting, real and in tune with today's difficult and challenging times. The Leadership series showcases intellectual leadership at an investment level, practice leadership at an advice level and technical leadership on advice matters in the SME sector.

- With negative returns occurring across most asset classes in recent years, conventional thinking on portfolio construction and modern portfolio theory has been increasingly questioned. The key to risk management and performance to risk is through asset allocation, but Strategic Asset Allocation has been replaced with Dynamic Asset Allocation and to a lesser extent, Tactical at sector level.
- The Leadership series brings two of the industry giants on Asset Allocation to the table to discuss what this means moving forward for planners, consultants, trustees and investors. The investment sessions traverse what institutional asset consultants are advising their clients and how this thinking differs to retail advice or not. Bear in mind most superannuants leave Super Funds under this guidance and turn to planners for retirement funding advice. Who really controls asset allocation and where are the rules changing in the paradigm of aging western economies and a European disaster zone? Where to from here, how much flexibility, growth and cash in a world of conflicting outcomes and potential pitfalls to capital protection?
- The practice management session will be a showcase of successful advice business that are adapting to the new world of FoFA, falling markets, increased demand for holistic advice and how these leaders are growing their headline revenue with changes in the margin chain. This is a session by advisers for advisers, not theorists on consulting.
- The session includes a study of what the practice heads focus on, what they specialise in and includes some free thinking about being a price maker not a price taker in the years ahead. If your revenue is down and new business is struggling, these thoughts may help you take control of your headline revenue while maximising your skill set.
- The technical session focuses on the impact of selling a small business. This is likely to increase in the year ahead if trading conditions worsen. It is not just about how much one can sell the business for, it is also important to ensure that the net amount (after tax) received is maximized through taking advantage of various SME exemptions and superannuation rollovers.

To Register...



# PARAGEM

## Dealer Services

### Leadership & Development Day

Up to 4.5  
CPD Points

Packages (please tick)	Price	Monthly
<input type="checkbox"/> Current Contracted Client		
<input type="checkbox"/> Professional Development & Leadership Day • This Professional Development & Leadership Day only	\$500 + GST = \$550	
<input type="checkbox"/> Professional Development & Leadership Series • Attendance at all 2012 Professional Development & Leadership Days • Attendance at 2012 PortfolioConstruction Conference	\$1,950 + GST = \$2,145 p.a	\$210 p.m
<input type="checkbox"/> Professional Development & Leadership package • Attendance at all 2012 Professional Development & Leadership Days • Attendance at 2012 PortfolioConstruction Conference • Kaplan Training Material, Training Plan and Training Register for 2012	\$2,350 + GST = \$2,585 p.a	\$240 p.m

#### Event (please tick)

Brisbane  
1 March

BRISBANE HILTON  
190 ELIZABETH ST  
BRISBANE 4000  
COFFEE FROM 8.30AM

Sydney  
6 March

MARRIOTT SYDNEY  
HARBOUR  
30 PITT ST  
SYDNEY 2000  
COFFEE FROM 8.30AM

Melbourne  
8 March

PARK HYATT MELBOURNE  
1 PARLIAMENT ST  
MELBOURNE 3002  
COFFEE FROM 8.30AM

#### Delegate One

Name: \_\_\_\_\_ Email: \_\_\_\_\_

#### Delegate Two

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Organisation: \_\_\_\_\_

Email (for invoicing): \_\_\_\_\_

Address: \_\_\_\_\_

Postcode: \_\_\_\_\_

Telephone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_

A tax invoice and agenda will be supplied upon receipt of registration. Payment is required prior to the event to confirm attendance. Cancellation received within 24 hours of the event will be billed the full amounts.

*The Paragem Professional Development & Leadership Day is an educational program designed for development purposes only. It does not constitute legal or other professional advice and should not be relied on as such. Participants should seek their own professional advice on the consequences of applying the information presented at the Professional Development & Leadership Day to specific circumstances. The content of the educational program is current as at the date of the Professional Development & Leadership Day.*

*Participants should make their own inquiries to determine whether their attendance at the Professional Development & Leadership Day satisfies their continuing professional development obligations under the relevant laws, ASIC Policy and the requirements of any applicable industry association.*

*Neither Pathway Licensee Services Pty Ltd nor the presenters shall be liable for any loss incurred by a participant, acting on the information provided at the Professional Development & Leadership Day.*

To Register: : [info@paragem.com.au](mailto:info@paragem.com.au) Fax: 02 9026 0499 Ph: 1300 722 100  
[www.paragem.com.au](http://www.paragem.com.au)