

PROGRAM – NEWCASTLE

Time	Dur	Item	CPD
9:00am - 9:30am	30	Registration / Exhibition open – arrival tea & coffee	
9:30am – 10:05am	35	Welcome – Introducing the Financial Advice Association of Australia (FAAA) David Sharpe CFP® – Chair, Financial Advice Association of Australia Sarah Abood – CEO, Financial Advice Association of Australia	0.5
10:05am – 10:35am	30	Policy & advocacy update for members Sarah Abood – CEO, Financial Advice Association of Australia	0.5
10:35am – 11:05am	30	A taxing question: the deductibility of financial advice fees – update and practical guidance Conrad Travers – Director and Principal Consultant, Tangelo Consulting Sharon Murray – Tax Controversy Partner, Deloitte	0.5
11:05am - 11:35am	30	Morning tea break	
11:35am – 11:55am	20	Showcasing best practice – 2022 AFA Female Excellence in Advice Winner Amie Baker Amie Baker – Director, Financial Adviser, Certified Money Coach, Rekab Advice and Centsability	0.25
11:55am – 12:10pm	15	ASIC update: Topical regulatory issues Leah Sciacca – Senior Executive Leader, Financial Advisers, ASIC	0.25
12:10pm - 1:05pm	55	Putting policy into practice – regulation through to compliance Phil Anderson – CEO, AFA & General Manager Transformation, Policy and Advocacy, Financial Advice Association of Australia Conrad Travers – Director and Principal Consultant, Tangelo Consulting Shail Singh – Lead Ombudsman Investments and Advice (Acting), Australian Financial Complaints Authority	1.0
1:05pm - 1:50pm	45	Lunch break	
1:50pm – 2:10pm	20	Showcasing best practice – 2022 FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Andrew Reynolds CFP® – Director and Principal Adviser, EFS Advice	0.25
2:10pm – 3:15pm	65	A member-led approach to Code of Ethics Standard 12 Michael Miller CFP® – Director, Capital Advisory	1.0
3:15pm – 3:45pm	30	Afternoon tea break	
3:45pm – 4:30pm	45	Keynote: Making good decisions Mark 'Squiz' Squirrell OAM	0.75
4:30pm – 5:30pm	60	Networking drinks	

Legislated CPD Areas	
General	0.5 hours
Client care and practice	1.25 hours
Regulatory compliance and consumer protection	1.75 hours
Professionalism and ethics	1.0 hours
Tax (financial) advice	0.5 hours
Total	5 hours