Education Series | 2012

Money Management

SYDNEY
Thursday 17 May 2012
Dockside, Sydney

SMAs, ETFs, Direct Investing 2012

Highlights of the CPD accredited workshop include:

Research Update

The latest SMA and Direct Equities research and findings from Investment Trends

Managed Accounts – a new or false dawn?

Managed Accounts give investors greater access to a portfolio of shares that are professionally managed and reported on in a cost effective manner. This session will look at SMa, IMAs and UMAs.

ETFs – something big?

Exchange Traded Funds are one of the fastest growing categories of investment products in the world. How do you implement a client ETF strategy and use ETFs in bulding a portfolio?

Understanding ETF synthetic structures

Synthetic ETFs allow replication of the index using derivatives as opposed to owning the physical assets. One motivation for using synthetic structures to replicate the index could be to reduce costs.

Direct Equities

- Implementing a client strategy for direct share investing
- Working with aligned professionals
- Share broking technology/research
- How to manage direct portfolios efficiently and scalably

Direct Fixed Interest Investing

There is a lot of interest in new products like subordinate notes and hybrids that are appearing in the market.

Earn
CPD points
9-10 points expected

Silver partnership

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The SMSF Academy

Authoritative, independent and relevant education for Financial Planners

Money Management

Money Management invites you to attend the second seminar in its 2012 Education series.

The Direct Investing workshop will cover off on Managed Accounts, ETFs, Direct Equities, and Direct Fixed Interest Investing.

Much effort has gone into selecting dynamic and authoritative speakers, ensuring this workshop is informative and practical.

I sincerely hope the content in this workshop significantly benefits you in your day-to-day practice.

Jayson Forrest,
Money Management Education

Earn CPD points { ***expected 9-10 points*** }

Key Speakers

Tim Bradbury

Tim has more than 20 years experience in Australian financial services, with the last seven years specialising in ETFs and Exchange Traded Products (ETPs). He co-launched and managed the team which initiated iShares ETFs in Australia and has seen the Australian ETF industry grow to more than 60 funds and in excess of $5 billion in assets.

Jon Reilly

Jon has worked as a Financial Planner and more recently, he has had operational responsibility for the Individually Managed Account (IMA) service of a leading private wealth advisory firm. Jon has extensive experience in the day-to-day management of an IMA service, including portfolio modelling, trading and settlement. He is a leading commentator on Managed Accounts.

For other speakers please visit website
www.moneymanagement.com.au

For sponsorship opportunities, contact Brad Lawson on (02) 9422 2695

Sydney

Thursday 17 May 2012

8:00am: Registration

8:30: Welcome

9:00am: Research Update
The latest SMA and Direct Equities research and findings from Investment Trends.

- What are the trends?
- What are planners doing?
- What is driving change – cost, flexibility, transparency, tax-effectiveness?

9.40am: Managed Accounts – A new or false dawn?
Managed Accounts give investors greater access to a portfolio of shares that are professionally managed and reported on in a cost effective manner. This session will look at SMAs, IMAs and UMAs.

10.30am: Morning tea

11.00: ETFs – something big?
Exchange Traded Funds are one of the fastest growing categories of investment products in the world.

11.50: Understanding ETF synthetic structures
Synthetic ETFs allow replication of the index using derivatives as opposed to owning the physical assets. One motivation for using synthetic structures to replicate the index could be to reduce costs.

12:40pm: Lunch

1.30pm: Direct Equities

- Implementing a client strategy for direct share investing
- Working with aligned professionals
- Share broking technology/research
- How to manage direct portfolios efficiently and scalably
- How do planners charge?

2.20pm: Direct Fixed Interest Investing
There is a lot of interest in new products like subordinate notes and hybrids that are appearing in the market. How do they compare to fixed interest alternatives?

3:10pm: Panel discussion: How do I add alpha for a client?
By looking at direct investing opportunities, can advisers add alpha for their clients? Includes active vs passive management, cost, complexity, platforms and scalability.

4:00pm: Closing Remarks and Workshop Wrap Up

4:15pm: Drinks and Networking

Comments

By Attendees from the 2011 Money Management Education Seminar

"Lots of info for CPD Points earned"

"Really good diversification of sessions"

Registration

Money Management

How to Register

ONLINE:

Go to www.moneymanagement.com.au/eventlist.aspx and follow the prompts.

MAIL:

Post your completed registration form to:
Money Management Seminars
Locked Bag 2999
Chatswood DC NSW 2067

PHONE:

Call (02) 9422 2896 to register over the phone.

Dockside
Balcony Level, Cockle Bay Wharf
Darling Park, Sydney
NSW 2000

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Tax Invoice
ABN 80 132 719 861

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☐ **Early Bird rate** (by 04/05/2012) - $220 inc GST
☐ **Standard rate** - $350 inc GST

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