

 **AVALONFS**<sup>™</sup>   
CONFERENCE - SYDNEY 2024

# ANNUAL CONFERENCE

4TH - 5TH SEPTEMBER  
SHANGRI-LA, SYDNEY

 **ASPEN**<sup>™</sup>  
LICENSING SERVICES



# CONFERENCE SCHEDULE

## WEDNESDAY 4<sup>TH</sup> SEPTEMBER

DAY 1 – 4/9/2024

<b>From 8:30am</b>	<b>Conference Registration</b>	
9:30am	Welcome to the AVALON 2024 Conference!	<b>AVALONFS</b>
9:45am - 10:00am	AVALON Update – Where we are headed	Neal Hornsby <b>AVALONFS</b>
10:05am - 10:45am	Margin Call	Patrick Noble <b>ZURICH</b>
<b>10:50am - 11:20am</b>	<b>MORNING TEA BREAK</b>	
11:25am - 12:05pm	Diversifying legislative risk	Michael Blake <b>CENTURIA</b>
12:10pm - 12:50pm	Innovative Retirement Income Streams	Julian Place <b>NORTH</b>
<b>12:50pm - 1:40pm</b>	<b>LUNCH</b>	
1:45pm - 3:00pm	Building a Will to escape Death Taxes, Bankruptcy & Divorce: A comprehensive Estate Planning Guide	Dr Brett Davies <b>KEYNOTE SPEAKER</b>
3:05pm - 3:50pm	Compliance Workshop – Ethical Dilemmas	Alvin Narayan <b>AVALONFS</b>
<b>4:00pm</b>	<b>Day 1 Business Sessions conclude AFTERNOON TEA SERVED IN FOYER</b>	
<b>6:30pm</b>	<b>Conference Opening Dinner Blu Bar on 36 – Level 36, Shangri-La Hotel Hosted by AVALON and North Platform</b>	

## OUR SPEAKERS



**Julian Place**  
**AMP | Retirement Specialist**

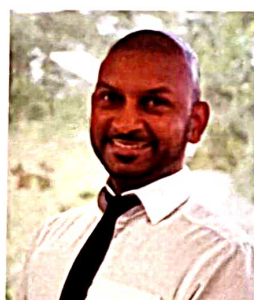
Julian Place CFP® has over 25 years of experience in financial advice across a range of roles including; Private Client Adviser, Partnership Manager, Advice Coach and Regional Manager. A past FAAA Board Director & Deputy Chair of the Financial Planning Education Council (FPEC), Julian holds an MBA, and is a recipient of the FAAA Distinguished Service Award.



**Dr Brett Davies**  
**LEGAL CONSOLIDATED BARRISTERS & SOLICITORS | Keynote Speaker**

Dr Brett is a highly accomplished professional with seven degrees, a doctorate in estate planning, and authorship of two leading textbooks in the field. Despite his extensive legal background, Dr Brett is a passionate advocate for financial planners taking the lead in the estate planning process, believing that they are uniquely positioned to understand and meet their clients' needs. In his seminar, Dr Brett will cover a range of critical estate planning topics, including the truth about Australia's four death duties, the strategic use of the 3-Generation Testamentary Trust, and the 32% death tax on superannuation. He will also explore why homes purchased before 1985 could still be vulnerable to Capital Gains Tax, strategies for including a Divorce Protection Trust in your Will to safeguard your children's inheritance, and methods to prevent challenges to your Will from mistresses and illegitimate children.

As an added benefit, AVALON has arranged for each attendee who asks Dr Brett a question during the seminar to receive a \$1,487 voucher to build their own Wills and Powers of Attorney.



**Alvin Narayan**  
**AVALONFS | Head of Compliance**

Alvin joined AVALON as Head of Compliance in December 2020 with experience spanning over 15 years. He is a seasoned professional in managing staff, providing adviser support and AFSL compliance.

Alvin began his professional career within the financial service industry with experience in credit & lending which started in the United States selling sub-prime mortgages prior to the GFC.

In 2006 he returned to Australia and from 2011 his experience is heavily involved within financial planning, paraplanning and AFSL compliance. Alvin holds a Advanced Diploma in Financial Planning, Diploma Financial Planning (FP), SMSF Certification.