



ANNUAL CONFERENCE WELLINGTON – JULY 13 – 15

## **IFA Investment MasterClass**

*In Association with*  
**PortfolioConstruction Forum**

**IFA Conference – Wed 13 July, Wellington Convention Centre**

**9.30am – 12.30pm**

*\$85 per person (IFA Members only)*

*Register in conjunction with your Conference Registration or email [jacqui@conferenceteam.co.nz](mailto:jacqui@conferenceteam.co.nz)*

**Theme:** Different Approaches to Investment Portfolio Design, Product Selection and Administration

In the aftermath of the Global Financial Crisis, after nearly a decade of disappointing investment returns, systemic demise of the finance company sector and with regulation of financial advisers now a reality, how does a well-meaning independent adviser set investment strategy, select suitable products and administer investment portfolios for clients that provide best practice standards at a fair cost and achieve clients' goals?

This is one of the key questions that all financial advisers that provide investment advice face – and a variety of models and approaches are followed in the market, with varying degrees of success.

The inaugural Investment Master Class will focus on addressing this question over three 45 minute sessions, looking at three different successful business models followed in the NZ market. Each presenter will present their approach for setting investment strategy, selecting appropriate products and administering investment portfolios for their clients. There will also be the opportunity for Q & A with each presenter.

This is an opportunity to examine current different approaches to investment advice, implementation and administration in some depth.

### **Three Case Studies:**

- The case for asset class investing – Craig Lubich, Executive Director, Plan B Wealth Management,
- The case for proactive asset allocation – David Yates, Investment Specialist, TNP Wealth Management, Auckland
- The case for direct investing – Martin Allison, Investment Adviser, Craig's Investment Partners, Auckland