



2026 Conference Agenda v3.

19 – 20 March 2026

Day 1 – Thursday, 19 March 2026

Time	Session	MC
9.00am	Intro and Housekeeping	Henry
9.05am	BFP President's Welcome Update on BFP and our discounts. New members to introduce themselves and be welcomed by the group.	Brent Giles
9.30am	Group Discussion <i>What has caused you the most headaches in the last 12 months?</i> Preconference Agenda sent out asking for all members to think of their top 3 headaches and wins over the last 12 months. Then at the tables we discussed these as a table and pick the top 1. Each table then goes through their biggest headache and we as a group try to solve. <i>Overflow to open forum session</i>	Henry
11.00am	Break – Morning Tea	
11.30am	Presentation and Panel Discussion <u><i>Efficiencies you can put in place quickly to free time</i></u> Nathan's session will cover: <ol style="list-style-type: none"> 1. Productivity and efficiency - knowing what you are good at and how to build discipline in this area. 2. CEO v adviser - what is the difference and how do you apply those differences. 3. How to prepare your business/book for sale or capital partner i.e. what acquirers are looking for. 	Chris Nathan Jacobsen, CEO, VBP
12.15pm	Break – Lunch	
1.15pm	Presentation – <i>"Is It Un-Australian to Dob?"</i> Unpacking standard 12 from a technical & practical perspective through an ethical lens.	Chris Rhett Das Integrity Compliance
1.45pm	Open Forum and More discussion on previous headaches. General discussion from the floor. Is there anything we've missed?	Lisa

2:15pm	<p>Presentation <i>AML/CTL Reform</i></p> <p>This year is an especially important one, with reformed AML/CTF laws coming into effect for existing reporting entities from 31 March.</p>	<p>Chris</p> <p>Dacian Moses</p>
2.45pm	<p>Presentation and Panel Discussion <i>Strategies to Improve Business Value</i></p> <p>There is some slides to set the scene around the market and they flow from the financial side to key business metrics - this helps firms to identify themselves in data and generally increases their appetite to learn more.</p> <p>The second section deals with Business Valuations and how owners can improve the cashflow and value of their business prior to a sale event. There are good practical steps that fall out of this and can be discussed / debated at question time.</p> <p><i>20mins preso with 25 mins panel discussion with Corin and Kurt</i></p>	<p>Henry</p> <p>Rob Jones/David Whelan Peloton Partners</p> <p>Corin and Kurt</p>
3.30pm	Break – Afternoon Tea	
4.00pm	<p>Presentation and Panel Discussion <i>AI in the workplace</i></p> <p>Andrew Rowan takes us through his journey of using AI Chris Fellas shows what iComply2 can do.</p>	<p>Henry</p> <p>Andrew Rowan</p> <p>Chris Fellas – iComply2</p>
4.50pm	Wrap Up	Brent Giles
	Dinner: Grana Privato - 6.30 for 7 dinner 4 Hr food and beverage package.	
	Day 2 – Friday, 20 March 2026	
Time	Session	Speaker
8.30am	MC Intro and Housekeeping	Chris
8.35am	<p>Group Discussion 1% improvements in last 12 months</p> <p>Preconference Agenda sent out asking for all members to think of their top 3 headaches and wins over the last 12 months.</p>	Chris

	<p>Then at the tables we discussed these as a table and pick the top 1.</p> <p>Each table then goes through their biggest headache and we as a group try to solve.</p> <p>Make sure mics are around the room and that participants say who they are so we can track. Last year was a bit free for all and hard to know who was giving the solutions.</p> <p><i>Overflow to open forum session</i></p>	
10.00am	<p>Guest Presenter</p> <p>James is one of the most intelligent, likeable and amazing people you could meet. Going blind from the age of ten, he's had more than his fair share of challenges in his life, but has triumphed over them and has achieved amazing feats. James is here to inspire you and remind you of things you can achieve by yourself and with the help of others.</p>	<p>Lisa</p> <p>James Pittar James Pittar Open Water Swimmer,</p>
11.00am	Break – Morning Tea	
11.30am	<p>Presentation – <u>FAAA Update</u></p> <p>FAAA Update but not the usual one. One that tells us more than what we already get from the regular newsletters and about all the FAAA submissions. Open and honest dialogue, with plenty of Q&A.</p> <p>FAAA ID portal</p>	<p>Melissa</p> <p>Sarah Abood FAAA</p>
12.00 pm	<p>Open Forum</p> <p>General discussion from the floor.</p> <p>Do we need prompts?</p>	Lisa
12.30pm	Break – Lunch	
1.30pm	<p>Presentation</p> <p><i>Presenting Advice</i></p> <p>Our very own Phil Mason-Cox will showcase how he has adopted video SoAs and technology in general to produce a better client engagement and compliant process.</p>	<p>Chris</p> <p>Phil Mason-Cox Keys FP</p>
2.15pm	<p>Presentation</p> <p><i>Succession Planning/Key Person Risk</i></p> <p>Cheyenne will take us through the compliance implications of “what if? What happens if you die and you are not prepared? What can you do to mitigate this risk?</p> <p>Link https://youtu.be/mqiCKXEsdFs.</p>	<p>Henry</p> <p>Cheyenne Walker AICD Compliance</p>
3.00pm	Final Comments & Thank Yous	Brent Giles