

FASEA CPD ACCREDITED FOR 4 HOURS APPROX.

IMAP 2021 VIRTUAL INVESTTECH

CONNECTING CLIENTS TO ADVICE

CONFERENCE DELIVERED VIA A SERIES OF WEBINARS
6 - 10 DECEMBER 2021

AGENDA

REGISTER NOW

REGISTER ONCE TO ATTEND ALL SESSIONS



INVESTTECH MC
PETER WORN FINURA



MONDAY 6TH DEC 12.00PM

ADVICETECH MEETS INVESTTECH

ANDREW WHELAN WEALTHO2



MONDAY 6TH DEC 12.30PM

DIGITAL REALISATION OF AN ADVICE PRACTICE - USING SOCIAL MEDIA EFFECTIVELY

NICOLE SMITH SOCIALSD



TUESDAY 7TH DEC 12.00PM

TOOLS FOR ADVISERS TO HAVE ENGAGING ESG CONVERSATIONS WITH CLIENTS

STUART ALSOP FEFUNDINFO



TUESDAY 7TH DEC 12.30PM

THE FUTURE OF DIRECT INVESTING

ERICA VLAVIANOS FINCLEAR
ANDREW JONES ASX



WEDNESDAY 8TH DEC 12.00PM

INTEGRATING MANAGED ACCOUNTS INTO ADVICE SOFTWARE

LANIE WORSLEY MORNINGSTAR
RICK DI CRISTOFORO MORNINGSTAR



WEDNESDAY 8TH DEC 12.30PM

ADVICE TECH CHOICES PLATFORM VS ECOSYSTEM

PETER WORN FINURA
BRETT EBEDDES



THURSDAY 9TH DEC 12.00PM

THE NORTH AMERICAN ADVISER EXPERIENCE WITH TURNKEY ASSET MANAGEMENT

ERIC ROCKS SS&C
STEPHANIE WILSON SS&C



THURSDAY 9TH DEC 12.30PM

HOW INVESTING IS EVOLVING, AND THE DIGITAL SOLUTIONS TO DELIVER PERSONALISED PORTFOLIOS TO CLIENTS AT SCALE

STUART HOLDSWORTH FINANCIAL SIMPLICITY



FRIDAY 10TH DEC 12.00PM

INNOVATION AWARD WINNER

SHELLEY GEORGE NUCLEUS WEALTH

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