

Agenda – Thursday 16th May 2019

CERTAINTY ADVISER CONFERENCE

CLIFTONS SYDNEY – 60 Margaret Street

12:30pm	Lunch provided on arrival
1:00pm	START <ul style="list-style-type: none"> • Welcome • Introduce New Certainty Advisers • Pressing Issues • Session's Objectives
1:15pm	PROGRESS TO DATE <ul style="list-style-type: none"> • Progress to Plan – Review November 2018 Commitments • Certainty Circles – Monthly Reviews • Feedback – Lessons, Obstacles, Insights
2:15pm	REVIEW CERTAINTY ADVISER INITIATIVES Certainty Website – Proposition, Language - Certainty Tools - Certainty Threads – Certainty Centre for Certainty Advisers - Public Relations - Social Back Office & Social Community Building - Certainty Videos for Clients, Firms, Alliances, Networks – Benchmarks - Accreditation Launch - Brand Ambassador - White Papers & Content Creation
2:45pm	Tea Break
3:00pm	IMPLEMENTING CERTAINTY ADVICE – Growing & Learning Together <ul style="list-style-type: none"> • Firm by Firm Presentations/Discussions <ul style="list-style-type: none"> ○ Lessons, Challenges, Solutions Delivering Certainty Advice <ul style="list-style-type: none"> ▪ Tabling of a specific Certainty Client Advice Map ○ Lessons, Challenges, Solutions Building Certainty Firms <ul style="list-style-type: none"> ▪ Tabling of specific growth issues
4:30pm	CERTAINTY ADVISER PLAN <ul style="list-style-type: none"> • Certification Announcement Plans <ul style="list-style-type: none"> ○ Objectives, Actions, Timeframes ○ Resources and Brand Ambassador/Champions • Implementing Certainty Threads • Standards <ul style="list-style-type: none"> ○ Audits
5:00pm	Day wrap up, confirm objectives, capture commitments, share learnings & close
5:30pm	Session Close
5:30-6pm	Dinner at nearby city venue ... <i>Everyone is welcome to join our 'Dutch' (i.e. we split bills) dinner. We gather at 6:30pm at a nearby vibrant city diner. For many, these casual dinner gatherings, where we change seating positions to meet as many members as possible, are the catalyst for on-going conversations and relationships or just opportunities to talk, have a bite and drink with people building similar firms learning from each other's experiences. Please note your interest if you'd like to join us?</i>