women banking and finance

Women in Banking and Finance Inc.
ABN 95 875 679 949

An Association contributing to the professional development of women in our industry


Brendan Ryan


Michael Perkins


Kallie Lam


Jeffrey Wrightson


Susie Newham

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MACQUARIE BANK

Intergenerational Wealth and Financial Planning

Venue: The Royal Exchange, 1 Gresham St, Sydney

Time: 5.45pm for 6pm – 7.45 pm, Wednesday 16 May 2012

A financial planning business with a retired and ageing client base is not necessarily a declining business – as long as it recognises that there is long term value in the business that can be turned into real growth.

Statistics show that there will be an estimated $600bn* transferred to approximately 2.7 million beneficiaries over the next decade. A huge opportunity for financial planners.

Take this opportunity to hear from a panel of experts who will discuss estate planning, aged care and the management of intergenerational wealth and retain funds under advice.

Panelists will address:

How do I seek Financial Advice when considering my family's financial future? Who are the advisers? Who manages the relationships? How many generations are affected?

Are these concerns of your clients and how are you addressing them?

Tax Invoice/Registration Form

Please book online at www.wibf.org.au or complete this form and fax to 1300 889 363 by 10 May 2012

Company: ....

Contact: ....

Phone: ....

Email: ....

Address: ....

Attendee's Name(s)	**Member** Yes/No
....	....
....	....
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Payment Details

Members: $50; **Non-members:** $55 (prices pp & incl GST)

Total payment of $_________

I am/we are paying by:

❑ Cheque ❑ EFT ❑ Visa ❑ Mastercard ❑ AMEX

Card No: ....

Expiry Date: ....

Cardholder's Name: ....

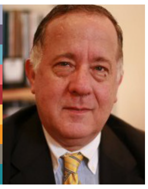
Cardholder's Signature: ....

Account Name: Women in Banking and Finance Inc.
BSB Number: 082-057 **Account Number:** 48584 1368
Bank: NAB, Pitt & Hunter Streets,101 Pitt Street, Sydney
EFT Payments: Fax or email with your payment advice

Women in Banking and Finance Inc
PO Box 576 Crows Nest NSW 1585
Ph: 02 9431 8670 **Fax:** 1300 889 363
Email: secretariat@wibf.org.au **ABN** 95 875 679 949

Brendan Ryan

With his strong analytical skills and knowledge of the changing legislative landscape, Brendan Ryan has helped his clients understand the complex factors involved with a move into residential aged care. Brendan works closely with a range of in-house specialists to provide his clients with a concise summary of their family member's financial situation and the options that may be available to them. Brendan is a Private Wealth Manager and has been with Macquarie Private Wealth since 1994. During this time, he has developed strong technical knowledge in financial planning and gained the right experience to help his clients plan for the future. Brendan can navigate clients through the time-consuming and complex issues, giving them the confidence to make this important decision in a timely manner.



Michael Perkins

Michael is a practicing lawyer with over 25 years experience in trusts, estates and private client practice.

Michael assists his clients create and manage multi –generation wealth management and succession strategies. He assists family groups with their operations and governance and business owners meet their succession and wealth extraction objectives. Michael also works for entrepreneur driven high growth businesses, family business owners and family groups committed to managing family wealth across generations.

Michael brings a multi-disciplinary approach to the challenges of corporate growth, asset protection, estate administration and succession for globalizing business as well as families seeking to manage their property for the benefit of subsequent generations and their broader community connections.

Kallie Lam

Kallie is a member of the Institute of Chartered Accountants in Australia and has been with Clark & Jacobs for 7 years. Over that time Kallie has forged extremely strong and loyal relationships with clients, enabling her to provide hands-on assistance in their accounting and tax needs, whether on a day-to-day basis or just at year end. Kallie also specialises in developing practical asset-protection and tax-effective structures for clients and their family and business interests.

Jeffrey Wrightson

Jeffrey joined Macquarie Bank in 1999 to assist with the development and expansion of the strategic financial planning division. Prior to Macquarie, he was instrumental in the establishment of the financial planning arm of Perpetual Private Clients.

Jeffrey has over 20 years experience in chartered accounting, merchant banking and as a principal of a boutique financial planning firm.

His broad expertise in developing tax effective strategies, financial markets, personal insurance and superannuation enable Jeffrey to analyse complex issues and provide comprehensive solutions, including investment portfolio management.

Susie Newham

Susie has 20 years of publishing experience primarily focused on the financial services industry in Australia but also including roles as Publishing Director for Reed Business Information in Australia and Managing Director of Reed Business Information in Singapore, Managing Director of eGuide in Singapore and Thailand.

Susie has seen many changes in the retail financial services market in the past 20 years and has never been more committed to supporting financial planning professionals. She brings her unique experience in the successful management of key financial services industry titles and websites such as Money Management, Super Review and Financial Planning Magazine and her passion for the Australian financial services sector to AdviserVoice.com.au - the information, education and community website for financial planners, giving them the deepest technical content available, creating a community place where barriers can be removed so that they can talk to, and learn from one another and get the message out to the broader community that this is a truly great profession.