

CLAIMS AGAINST FINANCIAL ADVISORS: KEY AREAS OF THE BATTLEGROUND

Presented by:

Rob Heath | Victorian Bar

John Tesarsch | Victorian Bar

Darryl Smith | Senior Associate, Clyde & Co

Chaired by:

Sasha Jeffrey-Bailey | Senior Associate, Barry Nilsson

In the wake of recent increases in litigation against financial advisors, this seminar will discuss key issues that arise in defending and resolving claims against financial advisors. The presenters have experience acting for financial planning firms in class actions and other litigation following corporate collapses, including the Timbercorp class action, making them well placed to provide practical insight regarding:

- The difficulties in identifying the scope of an adviser's retainer and duty of care, and statutory duties. For instance, to what extent will he or she be required to warn of the risks of a proposed investment?
- The issue of causation, which can often be the central battleground for a claim;
- Assessing the quantum that may be recovered by a successful claimant, and the circumstances in which that quantum may be reduced, including by reason of contributory negligence and proportionate liability;
- Insurance issues, including a discussion of the recent Full Federal Court decision of *Todd v Alterra at Lloyds Ltd* [2016] FCAFC 15; and
- Proposed legislative reforms, which have recently been the subject of widespread debate.

This seminar will be of special interest to insurance claims managers, brokers, and legal practitioners.

This event attracts 1 CPD point

Tuesday 23 August 2016

Venue: Wotton + Kearney, Level 15, 600 Bourke Street, Melbourne

5:00pm REGISTRATION

5:30pm INTRODUCTION & PRESENTATION

6:30pm DRINKS & CANAPES

*Registration fee includes drinks & Canapés

Registration closes Friday 19 August 2016



online registration available at www.aila.com.au



VIC SEMINAR: Claims Against Financial Advisors



ABN: 81 052 374 713

Tuesday 23 August 2016

REGISTRATION FORM & TAX INVOICE

REGISTRATION DETAILS

	Delegates Name & Firm (if different)	Member \$55.00* Incl GST	Non-Member \$66.00* Incl GST	Student \$10.00 Incl GST	B.A.C** \$25.00 Incl GST
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
				Total Incl GST	\$

***Group booking discount - SAVE \$5.00 per delegate when you register five or more to attend**
Deduct \$5.00 per person in the total box, members \$50.00, Non-members \$61.00. Not applicable to the student rate.
****Bring a Client (B.A.C) is only available to AILA members. The client must be industry based**

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Return to: AILA, PO Box 2011 FOREST HILL VIC 3131
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FOR EVENT CANCELLATION AND PRIVACY POLICIES, PLEASE REFER TO THE AILA WEBSITE

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