



# 2026 Retirement and Investment Masterclass Agenda

| TIME          | TOPIC                                                    | SPEAKER              |
|---------------|----------------------------------------------------------|----------------------|
| 08h30 - 08h35 | Welcome & opening                                        |                      |
| 08h35 - 09h20 | Two-Pot System & Modern Retirement Fund Strategies       | Johann Peens, CFP®   |
| 09h20 - 10h05 | Advanced Investment Strategies & Portfolio Construction  | Craig Gradidge, CFP® |
| 10h05 - 10h20 | <i>TEA BREAK</i>                                         |                      |
| 10h20 - 11h05 | Tax Planning for Multi-Income & Retirement Investors     | Stephan de Wet, CFP® |
| 11h05 - 11h50 | Behavioural Finance in Retirement & Investment Decisions | Lara Warburton, CFP® |
| 11h50 - 12h00 | Q&A and Closing                                          |                      |