Agenda - 2025 Advice Policy Summit

Monday, February 10

9:30am - 10:30am	**Registration and arrival morning tea**
10:30am - 10:40am	**Opening remarks**
10:40am - 11:50am	**Opening panel: The past, present and future of advice reform**

This opening panel, featuring industry leaders from a range of different perspectives and business models, reflects on the three-year Quality of Advice Review process. This session will debate and discuss the final stages of the Delivering Better Financial Outcomes package, including the controversial "qualified adviser" proposal and provide an overview of the key themes and objectives of the summit.

Includes: table discussion



Marisa Broome
Principal, Wealthadvice



Keith Cullen
Founder and managing director, WT Financial Group



Anne Fuchs
Executive general manager, advocacy and impact, Australian Retirement Trust



Michelle Levy
Lead, Quality of Advice Review; Partner, Allens



Xavier O'Halloran
CEO and founding director, Super Consumers Australia



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

11:50am - 12:30pm	**Keynote: Regulatory priorities in financial advice**

The Australian Securities and Investments Commission will discuss its role in relation to the regulatory framework for the financial advice profession, along with its regulatory and enforcement priorities for 2025.



Alan Kirkland
Commissioner, ASIC



CHAIR

Chris Dastoor
Editor, Professional Planner

12:30pm - 1:20pm **Lunch**

1:20pm - 2:00pm **Panel: The tension between principles-based and prescriptive regulation**

This panel of experts will assess the legal, regulatory and cultural hurdles in the financial services industry that may be preventing advice providers from innovating or reaching more Australians. It will examine challenges in the legislative process and the optimal balance between self-regulation and more explicit regulatory guidance, as well as providing delegates practical ways to better engage in the legislative reform process.



Prof Pamela Hanrahan
Consultant, Johnson Winter Slattery



Andre Moore
Assistant secretary, financial system division, Commonwealth Treasury



Michael Vrisakis
Partner, Herbert Smith Freehills



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

2:00pm - 3:00pm **Panel: The new era of superannuation and retirement advice**

This panel of leaders will examine the emerging models of intra-fund, general personal advice being offered by or in partnership with superannuation funds to establish a sense of best practice and ask what policy settings or legislative changes are required to ensure quality service for members. It will address the ways in which the Retirement Income Covenant is re-shaping super sector attitudes towards advice.

Includes: table discussion



Greg Cook
CEO, Eureka Whittaker Macnaught



Andrew Gregory
General manager, financial advice and



Edwina Maloney
Group executive, platforms, AMP

education, UniSuper



Aaron Minney
Head of retirement income research, Challenger



Dr David Bell
Executive director, The Conexus Institute

3:00pm - 3:30pm **Afternoon tea**

3:30pm - 5:30pm **Financial advice reform and the federal election**

This multifaceted session will hear from representatives of the Albanese government and federal opposition about their respective approaches to financial advice. It will seek to get clarity on the final stages of the DBFO legislation and ask what the advice profession and retirement system can expect from the next government after the federal election. It will also feature a preview and response from industry leaders, who will explain where advice reform sits within their executive and organisational priorities.



Peter Chun
CEO, UniSuper



Kate Farrar
CEO, Brighter Super



Scott Hartley
CEO, Insignia Financial



The Hon Luke Howarth MP
Shadow Assistant Treasurer, Shadow Minister for Financial Services



The Hon Stephen Jones MP
Assistant Treasurer, Minister for Financial Services



Deanne Stewart
CEO, Aware Super



Colin Tate AM
Founder and managing director, Conexus Financial



Aleks Vickovich
Editor-in-Chief, Conexus Financial

5:30pm - 5:35pm **Closing remarks**



Aleks Vickovich
Editor-in-Chief, Conexus Financial

6:00pm - 10:00pm **Conference dinner | The Courtyard, Hotel Kurrajong**

Tuesday, February 11

8:30am - 8:55am **Arrival tea and coffee**

8:55am - 9:00am **Welcome back**



CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

9:00am - 9:45am **In Conversation: Australia's place in the world under Trump 2.0**

In this exclusive keynote session, delegates will hear from former Liberal Treasurer and Australian Ambassador to the US, Joe Hockey, about the outlook for US and Australian politics and how business leaders can effectively engage with the political process.



The Hon Ambassador Joe Hockey
Global president,
Bondi Partners;
Former Federal
Treasurer



CHAIR

Colin Tate AM
Founder and
managing director,
Conexus Financial

9:45am - 10:35am **Panel: Professional standards and pathways post-QAR**

This session will debate and dissect whether the professional standards regime for financial advice as implemented by the now defunct FASEA is fit for purpose following implementation of the QAR. It will assess whether changes to the Code of Ethics are warranted, whether CPD requirements need to be reformed and examine solutions to attracting more smart, young, ethical and diverse candidates to the profession.

Includes: table discussion



Sarah Abood
CEO, Financial Advice Association



Eugene Ardino
CEO, Lifespan Financial Planning



Lionel Rodrigues
Principal, IFM Securities



Prof Deen Sanders OAM
Partner, Deloitte Integrity; Former CEO, FASEA



CHAIR

Chris Dastoor
Editor, Professional Planner

10:35am - 11:05am **Morning tea**

11:05am - 11:40am **Panel: Resuscitating a life insurance advice ecosystem**

This panel of leading life insurance representatives and risk advisers will debate how the Life Insurance Framework can be improved, as well as the policy levers that can be pulled to expand access to risk advice. With a new class of adviser that could be utilised to help expand access to advice, including by insurers, the session will also assess the merits of modifying the education standard to better facilitate the speciality of risk advice.



Christine Cupitt
CEO, Council of Australian Life Insurers



Sam Perera
Director, Perera Crowther Financial Services



The Hon Nathan Rees
Head of external affairs & public policy, MetLife Australia



The Hon Bert van Manen MP
Liberal Member for Forde; former financial adviser



CHAIR

Chris Dastoor
Editor, Professional Planner

11:40am - 12:10pm **Unpacking the Compensation Scheme of Last Resort**

This session will hear from David Berry, the CEO tasked with implementation of the CSLR, one of the more contentious pieces of public policy emerging from the Hayne royal commission. Berry will provide an update on the outlook for claims that have come through about United Global Capital and Dixon Advisory. Ahead of Treasury's review of the scheme, this interactive session will provide delegates an opportunity to engage with the prospect of an improved or redesigned policy.



David Berry
Chief executive, CSLR



CHAIR

Chris Dastoor
Editor, Professional Planner

12:10pm - 12:55pm **Panel: Enabling a new era of advice innovation**

This session will analyse the policy settings underpinning financial advice technology and service innovation, including efficiency initiatives for professional advice providers and elusive consumer-facing models of digital and simple advice. It will present both the case for reform of laws inhibiting innovation as well as highlight commercial levers and productivity hacks open to advice providers in lieu of regulatory reform.



Dr Paul Moran
Principal and financial adviser, Moran Partners Financial Planning; CEO and founder, iFactFind



Andrew Alcock
CEO and managing director, HUB24



Renato Mota
Former CEO, Insignia; financial advice advocate



Tanya Seale
Group executive technology solutions, Centrepoint Alliance



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

12:55pm - 1:45pm **Lunch | The members dining room**

1:45pm - 2:05pm **Ted Talk: The many paths to retirement outcomes**

Research from The Conexus Institute explores how retirees will be supported through guidance and advice. The foundation is an understanding of different retiree types, namely their personal situation and the way they will engage with their retirement decisions. From here, in an interactive manner we explore how these needs will be met by financial advisers, super fund trustees, and government. The role of technology, policy requirements, and friction points will all be discussed. At its heart, scalable solutions will require a trade off between quality, cost, and regulatory risk appetite.

Dr David Bell
Executive director,



The Conexus Institute

2:05pm - 3:05pm **Panel: Advocating for the social value of advice**

The final session of the summit will draw out industry consensus and ask how the industry can best advocate for the value of advice to policymakers and consumers. It will assess the next steps in the project to democratise access to advice and analyse the role that leaders from across the various industry associations and sub-sectors can play in forging a prosperous future for the ecosystem.

Includes: table discussion



Blake Briggs
CEO, Financial Services Council



Matt Lawler
CEO, NewCo (Entireti Group)



Damien Mu
CEO, AIA Australia



Misha Schubert
CEO, Super Members Council



CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

3:05pm - 3:15pm **Closing remarks and conference close**



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial
