

Agenda

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



Aleks Vickovich
Editor-in-Chief,
Conexus Financial

CHAIR

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



CHAIR

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



CHAIR

Colin Tate AM
Founder and
managing director,
Conexus Financial



CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

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



CHAIR

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



Chris Dastoor
Editor, Professional
Planner

CHAIR

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,
Centrepont Alliance



Aleks Vickovich
Editor-in-Chief,
Conexus Financial

CHAIR

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
