Agenda - 2026 Advice Policy Summit

Monday, February 23

9:30am - 10:30am **Morning tea on arrival and registration**

10:30am - 11:20am **Welcome remarks**



Andrew Alcock
Chief executive and managing director, HUB24; Principal partner, Advice Policy Summit



Aleks Vickovich
Editor-in-chief, Conexus Financial

11:20am - 12:20pm **Panel: The big picture in financial advice policy and regulation**

The opening panel will address the key issues in the business and regulation of financial advice, setting the scene for the summit. It will examine how the advice ecosystem balances the need for consumer protection with the desire to remove red tape and expand access to advice. It will debate next steps and impact of the Delivering Better Financial Outcomes legislation, and the big demographic and secular head- and tailwinds facing the industry. It will draw out the delegation's utmost policy priorities and the realpolitik of turning them into law.

Includes table discussion



Marisa Broome
Principal, Wealthadvice; advisory board member, The Conexus Institute



Keith Cullen
Founder and managing director, WT Financial Group Limited



Kate Farrar
Chief executive, Brighter Super



Misha Schubert
Chief executive, Super Members Council; vice president, National



Aleks Vickovich
Editor-in-chief, Conexus Financial

Press Club of
Australia

12:20pm - 12:50pm **Keynote: Regulatory priorities in financial advice**

This session will provide an exclusive briefing on the Australian Securities and Investments Commission's investigation into Shield and First Guardian and the regulator's priorities in financial advice, including oversight of AFSLs, use of AI, self-managed super fund advice, managed accounts and exposures to public and private markets.



Alan Kirkland
Commissioner, Australian Securities and Investments Commission



CHAIR

Chris Dastoor
Editor, Professional Planner

12:50pm - 1:50pm **Conference lunch | Chairman & Yip**

1:50pm - 2:30pm **Ted talk: Anatomy of a scandal**

This session will unveil exclusive CoreData research on how the Shield and First Guardian crisis has affected consumer sentiment towards financial advice, superannuation and the broader industry. It will also question the role played by gatekeepers in a fragmented advice landscape.



Andrew Inwood
Global chief executive, CoreData Group



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

2:30pm - 3:30pm **Workshop: Devising a world-class consumer protection and remediation framework**

Continuing with the theme of the industry's response to the Shield and First Guardian incident, this session will consider the next steps for remediation of victims, and the implications for the Compensation Scheme of Last Resort and industry's external dispute resolution frameworks. It will examine opportunities for intelligence sharing and enhanced governance to prevent another consumer crisis.

Includes table discussion



David Berry
Chief executive, Compensation Scheme of Last Resort



Blake Briggs
Chief executive, Financial Services Council



Shail Singh
Lead ombudsman – investments and advice, Australian Financial Complaints Authority



Darren Steinhardt
Founder and managing director, Infocus



CHAIR

Chris Dastoor
Editor, Professional Planner

3:30pm - 4:00pm **Afternoon tea**

4:00pm - 4:50pm **Panel: Leadership, social licence and super**

As superannuation surpasses $4 trillion in assets, the system is expanding its influence over the economy, sharemarket and provision of financial advice. This session features a candid conversation with industry leaders about the national contribution made by our unique super system as well as the systemic risks facing or accelerated by it, and its relationship with key segments of the broader industry including professional advice and adviser-facing platforms.



Matt Heine
Chief executive, Netwealth



Damien Mu
Chief executive, AIA Australia



Kathy Vincent
Chief executive, Australian Retirement Trust



Neil Younger
Group chief executive, Entireti



CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

4:50pm - 5:30pm **Keynote: Financial advice and the Albanese government**

This exclusive briefing will update delegates on the federal government's financial advice agenda, including the Delivering Better Financial Outcomes legislation, Compensation Scheme of Last Resort review and fallout from the Shield and First Guardian collapses.



The Hon Daniel Mulino MP
Assistant Treasurer and Minister for Financial Services



Colin Tate AM
Founder and managing director, Conexus Financial



Aleks Vickovich
Editor-in-chief, Conexus Financial

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

6:30pm - 10:00pm **Networking drinks and conference dinner**

National Gallery of Australia

Tuesday, February 24

8:55am - 9:00am **Opening remarks**



Aleks Vickovich
Editor-in-chief, Conexus Financial

9:00am - 9:30am **Keynote: Platforms, productivity and the profession**

In a fragmented financial advice landscape, trusted service providers take on additional significance. This session will combine a keynote address from the summit's principal partner, followed by a wide-ranging fireside chat on how to foster a culture of innovation, due diligence and prosperity for advisers and consumers.



Andrew Alcock
Chief executive and managing director, HUB24; Principal partner, Advice Policy Summit



Aleks Vickovich
Editor-in-chief, Conexus Financial

9:30am - 9:45am

In conversation: Word from the federal Opposition

In this session, a senior representative of the new-look Coalition leadership and economic team will discuss the federal Opposition's views on the key policy debates across superannuation and financial services, as well as their ideas to boost productivity in the economy.


DIGITAL

Tim Wilson MP
Shadow Treasurer of Australia, Member for Goldstein


CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

9:45am - 10:35am **In conversation: A wild ride in Australian politics**

The emergence of the so-called teal independent movement is among the more significant developments in recent Australian political history, with major implications for policymaking and power dynamics. This fireside chat will provide candid reflections on politics, policy and the press.



Zoe Daniel
Former independent MP for Goldstein and ABC foreign correspondent


CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

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

11:05am - 11:45am **Panel: Restoring trust, longevity and expertise in the profession**

The introduction of professional standards has significantly lifted the quality of financial advice in the country, but it's come with the cost of a reduction of adviser numbers and a reduction in the amount of Australians receiving advice. This discussion will dissect the policy levers that need to be pulled to help facilitate the growth of the profession and how to best include specialisations and sub-sectors without diluting hard-fought guardrails.



Robin Bowerman
Board director, Vanguard Super



Hamish Dee
Chair, Morgans; chair, Stockbrokers and Investment Advisers Association



Paul Heath
Chief executive, Koda Capital



Natalie Kleibert
Deputy chair, Pro Bono Financial Advice Network


CHAIR

Chris Dastoor
Editor, Professional Planner

11:45am - 12:15pm **Ted Talk: Pathways to better retirement outcomes**

This session will present the latest academic research on developing a world-class retirement experience for superannuation fund members, drawing out the key contentions between hard and soft defaults, product design and implementation, nudges and advice - and the scope for government- and or industry-led solutions.



Dr David Bell
Executive director, The Conexus Institute


CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

12:15pm - 1:15pm **Panel: The silver tsunami, decumulation and advice**

Superannuation funds are being called on to play a more active role helping members transition to retirement as Australia grapples with the demographic wave of an ageing population and retiring Baby Boomer generation. This session will dissect and debate the policy landscape governing the complex questions of super and retirement advice, and the strategies and decisions facing funds across comprehensive, digital and external channels.

Includes table discussion



Adrian Aardoom
Head of retirement distribution, Challenger



Ross Ackland
Head of guidance and advice, AustralianSuper



Terry Donohoe
Managing director and chief executive, Ignition Advice



Kelly Power
Chief executive, Colonial First State Super


CHAIR

Dr David Bell
Executive director, The Conexus Institute

1:15pm - 2:00pm **Lunch**

2:00pm - 2:45pm

Panel: Innovation, managed accounts and the advice tech stack

This session will examine how the advice profession is adapting to technological change and a range of industry-and government-led policies to underpin innovation in the ecosystem. It will debate the rise and rise of managed portfolios, AI and cyber governance and advent of digital advice.



Jason Entwistle
Director strategic development, HUB24



Nathan Jacobsen
Chief operating officer, AZ Next Generation Advisory



Matt Lawler
Chief executive, Akumin



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

2:45pm - 3:45pm

Panel: Advocating for Australian advice

The final session of the summit will conclude and reflect on the key debate and seek consensus on how best to promote the provision of financial advice to policymakers and regulators and in the community. It will assess the optimal path ahead for advice law reform, consumer protection and democratisation of advice.

Includes table discussion



Sarah Abood
Chief executive, Financial Advice Association Australia



Andrew Gregory
Chief advice officer, UniSuper



Frank Lombardo
Chief executive, MUFG Retirement Solutions ANZ



Darren Whereat
Chief executive, Rhombus Advisory



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

3:45pm - 3:50pm

Closing remarks