Agenda

Wednesday, February 8

7:15am - 8:30am **Women’s breakfast – Stella Network**

Relaunch of the Stella Network initiative to support more women in financial planning.

Carolina Soto
Barrister, Soto Chambers

8:30am - 9:00am **Registration**

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

9:00am - 9:45am **When I’m 64?**

Retirement Solutions

The Retirement income Covenant has forced super funds to move their focus from accumulation to retirement – which has great implications for advice.

Marisa Broome
Principal, wealthadvice

Anne Fuchs
Head of advice, Australian Retirement Trust

Ben Hillier
General manager retirement solutions, AMP

James Kingston
Head of practice solutions, Blackrock

CHAIR

Simon Hoyle
Group publisher, Conexus Financial

9:45am - 10:30am

Should I stay or should I go?

A big question that many advisers ask – should they stay with a licensee or should they go for their own AFSL.

Following the Royal Commission – many advisers had to find new licensees as the bank-owned groups dissolved. Some went their own way while others found new groups. Four years on, there is some restlessness from both sides. We talk about the good, the bad, and the ugly of each.

Keith Cullen
Founder and managing director, WT Financial Group

Anne Graham
CEO and financial adviser, Story Wealth Management

Liam Shorte
Director and SMSF specialist adviser, Verante Financial Planning

CHAIR

Julia Newbould
Managing editor, Conexus Financial

10:30am - 10:50am	**Morning tea**

10:50am - 11:35am **Simply the best.**

Quality of Advice – Best interests.

Whether or not the proposed removal of Best Interest duty makes it through – it's certainly opened the discussion. If it was no longer legislated - how will the replacement of best interests work in a practical sense? How do you implement it into your process? And what will AFCA's view be on advisers working outside it.

Allison Dummett
General manager licensees, Centrepoint

Shail Singh
Lead ombudsman investments and advice, AFCA

CHAIR

Simon Hoyle
Group publisher, Conexus Financial

11:35am - 12:20pm **The future's so bright**

Quality of Advice - Education.

What are the implications on education following the Quality of Advice Review?

Deborah Kent
Founder and director, Integra Financial Services

Tara Ross
Head of GPS wealth

Dean Thomas
Head of growth markets, Metlife

CHAIR

Chris Dastoor
Editor, Professional Planner

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

1:20pm - 2:05pm **Bring it on home to me**

Building internal investment teams – the rise of the asset consultant.

As many planning practices contemplate bringing research inhouse we look at how you use external research – particularly macro research to make it relevant for your clients and their investments. For practices looking at setting up an internal team – we consider the function of the team, who needs to be on it, how regularly they should meet, what are the issues they need to discuss, how you afford it in your business and using asset consultants to your best advantage.

Angela Ashton
Director and founder, Evergreen Consultants

Mark Minchin
Managing partner, Minchin Moore Private Wealth

Richard Rauch
Investment director, Brandywine Global Investment Management

CHAIR

Simon Hoyle
Group publisher, Conexus Financial

2:05pm - 2:25pm **Every move you make...**

5 ways to protect your business from scammers and cyber-threats.

Practical things for advisers and business owners. This session is designed for practitioners to leave with ideas they can implement immediately on their return to the office.

Fraser Jack
Founder, Cyber Collective

CHAIR

Julia Newbould
Managing editor, Conexus Financial

2:25pm - 3:10pm **Computer games: Tech solutions for your business**

How to get the most from the solutions you already have? When to use digital advice solutions?

Peita Diamantidis
Co-founder Caboodle Financial Services, and host of the Ensombl (formerly XY Adviser) podcast

Vincent Holland
Co-founder, Plutosoft

Recep III Peker
Founder, Empower Business Advisory

David Pritchard
Executive director, wrap, Colonial First State

CHAIR

Chris Dastoor
Editor, Professional Planner

3:10pm - 3:30pm **Afternoon tea**

3:30pm - 4:15pm **Things can only get better: Mergers and acquisitions – how do you grow**

Growing your business significantly will usually mean merging or acquiring another practice – what you need to know in doing this successfully. What is best practice, how are businesses achieving growth in this market.

Lisa Fuentes
Chief operating officer, Alteris

Natalie Isborn
Principal, JNP Advisory

Jamie Melville
Division director - head of new

business, wealth solutions, Macquarie Group

CHAIR

Julia Newbould
Managing editor, Conexus Financial

4:15pm - 5:00pm

Brass in pocket: What do investors want?

Whether it's for expansion or succession planning, many advisers are looking to investors for an injection of cash. But what are investors looking at when it comes to putting money into financial planning practices. Licensees are looking to invest in practices and make money from an equity share as it becomes harder to make money with licensee services. Overseas investors are seeing value in financial planning practices too – we discuss with investors what they are all looking for to find out if they are all looking at the same valuations and the same type of practices.

David Haintz AM
Principal at Global Adviser Alpha & Merchant Investment Management

Paul Heath
Chief executive officer, Koda Capital

Wayne Marsh
Head of mergers and acquisitions, Diverger

CHAIR

Simon Hoyle
Group publisher, Conexus Financial

5:00pm - 5:40pm

Still haven't found what I'm looking for: Sourcing and retaining talent

The biggest issue for most advisers is meeting client demand. We look at how you find new advisers, how to onboard them successfully, and how to become an employer of choice. Ogilvy – one of the world's leading advertising agencies is a talent driven business that knows people are its money makers. This means keeping them happy and engaged is vital in the success of the business. Learning how to build a company where people want to come and stay is what this session is about.

Toby Harrison
Chief strategy office, Ogilvy AUNZ

CHAIR

Julia Newbould
Managing editor, Conexus Financial

5:40pm - 6:00pm **With a little help from my friends**

Taking care of your mental wellbeing.

Tim Hewson
Founder, Mongrels Men Health and Wellbeing and national sales manager wealth and deposits, ING Australia

CHAIR

Julia Newbould
Managing editor, Conexus Financial

6:00pm - 8:00pm **Conference close and drinks**