

2023 Advice Practitioner Summit

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

Simon Hoyle

Group publisher,



James Kingston
Head of practice
solutions, Blackrock



CHAIR

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.



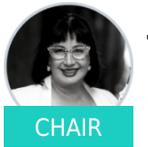
Keith Cullen
Founder and
managing director,
WT Financial Group



Anne Graham
CEO and financial
adviser, Story
Wealth Management



Liam Shorte
Director and SMSF
specialist adviser,
Verante Financial
Planning



Julia Newbould
Managing editor,
Conexus Financial

CHAIR

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,
Centrepont



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



Chris Dastoor
Editor, Professional
Planner

CHAIR

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



Simon Hoyle
Group publisher,
Conexus Financial

CHAIR

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



Julia Newbould

Managing editor,
Conexus Financial

CHAIR

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



Simon Hoyle

Group publisher,
Conexus Financial

CHAIR

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



Julia Newbould

Managing editor,
Conexus Financial

CHAIR

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



Julia Newbould

Managing editor,
Conexus Financial

CHAIR

6:00pm - 8:00pm

Conference close and drinks