

Agenda - 2023 Licensee Summit

Monday, June 19

8:30am - 10:15am **Coach transfers - Sydney Airport to Hydro Majestic**

10:00am - 10:30am **Registration and morning tea**

10:30am - 10:35am **Welcome**

10:35am - 11:20am **How we have landed - one small step advice**

Setting the scene for the response to the Quality of Advice Review and how this will affect licensees. This session will dissect the likely outcomes for education, super funds and digital advice.



Philip Anderson

General manager
policy and
advocacy, FAAA



**Jacqui
Henderson**

Founder and chief
executive officer,
Advice Intelligence



Daniel Shrimski

Managing director,
Vanguard Australia



Simon Hoyle

Group publisher,
Conexus Financial

CHAIR

11:20am - 12:20pm **Licensee businesses of today**

According to research by CoreData there are six basic licensee models which will be dissected in this session.



Ben Devenish

Managing director,
Vantage Wealth
Management



Anne Fuchs

Executive general
manager, advice
guidance and
education,



Andrew Inwood

Global chief
executive officer,
CoreData

Australian
Retirement Trust



Matt Lawler
Managing director of
advice, AMP



CHAIR

Julia Newbould
Managing editor,
Conexus Financial

12:20pm - 1:05pm

Who is investing in licensees?

We look at ASX-listed businesses and hear from a share analyst about they value licensees.



Nathan Jacobsen
Managing director,
Diverger



Paul Kelly
Managing director,
Futuro Financial
Services



James Tracey
Director, Industrials
research, Veritas
Securities



CHAIR

Simon Hoyle
Group publisher,
Conexus Financial

1:05pm - 1:55pm

Lunch

1:55pm - 2:40pm

Spotlight on the big guys

Alexis George and Renato Mota return to the summit to discuss their business models and how their directions have shifted over the last year.



Alexis George
Chief executive
officer, AMP



Renato Mota
Chief executive
officer, Insignia
Financial



CHAIR

Colin Tate AM
Managing director,
Conexus Financial

2:40pm - 3:30pm

How licensees are making money by investing in practices

The session assesses how licensees are investing in advice practices and how they are correctly pricing it to ensure they are receiving a return commensurate with their risk.



Mark Ballantyne
General manager,
Equity partnerships,
AMP



Paul Barrett
Chief executive
officer, AZ Next
Generation Advisory



Keith Cullen
Founder and
managing director,
WT Financial Group



CHAIR

Julia Newbould
Managing editor,
Conexus Financial

3:30pm - 3:50pm

Afternoon tea

3:50pm - 4:30pm

Attracting more women and other revolutionary ideas

Advice has a supply problem and a stark gender imbalance. How can the profession add more people and make the professional year more economical and how can advice practices better manage admin, grow their client base and increase profitability.



Helen Blackford
Chief executive
officer, Millennium
3, Lonsdale, IOOF
Alliances



Allison Dummett
General manager
licensees,
Centrepont



Nicole Mahan
Commercial director
ANZ, Iress



CHAIR

Chris Dastoor
Editor, Professional
Planner

4:30pm - 5:10pm

In the interest of insurance

The shift in the regulatory landscape has hampered risk insurance distribution. The session reviews what insurers are doing to help licensees and practices comply with their requirements to provide holistic advice.



Christine Cupitt
Chief executive
officer, Council of
Australian life



Jaime Johns
Managing director,
Avanzare Group



Craig Parker
General manager,
Retail distribution,
AIA Australia

insurers



CHAIR

Julia Newbould

Managing editor,
Conexus Financial

5:10pm - 5:15pm	Close
5:15pm - 5:30pm	Bus to Lilianfels
6:15pm - 7:00pm	Fireside chat and networking reception - Lilianfels Lounge
7:00pm - 9:00pm	Conference dinner - Darley's Restaurant

Tuesday, June 20

8:15am - 8:30am	Bus to Hydro Majestic
9:00am - 9:05am	Welcome

9:05am - 9:50am **Unveiling the 2023 CoreData Licensee Research**

CoreData reveals its annual Licensee Research, given all licensee heads insight to what they could do to better serve advisers. A can't miss session for any licensee that wants to stay on the pulse of what advisers are thinking.



Andrew Inwood

Global chief
executive officer,
CoreData



CHAIR

Colin Tate AM

Managing director,
Conexus Financial

9:50am - 10:35am **Changing focus - Where the regulators and lawyers are looking right now**

ASIC and AFCA will engage with the profession and discuss its key areas of focus in the coming year, while class action law firm Maurice Blackburn will inform the industry to what it sees as

weak points to address from a consumer perspective.



Josh Mennen
Principal lawyer,
Maurice Blackburn



Leah Sciacca
Senior executive
leader, Financial
advisers, ASIC



Shail Singh
Lead ombudsman
investments and
advice, AFCA



CHAIR

Chris Dastoor
Editor, Professional
Planner

10:35am - 11:00am Coffee break

11:00am - 11:40am The ongoing cybersecurity risks

Last year Peter Ornsby provided a case study on the cyberattack faced inside his network and the ensuing fallout. One year later how is he keeping on top of it and what are other practices doing?



Fraser Jack
Founder, Cyber
Collective



Peter Ornsby
Chief executive, RI
Advice Group



CHAIR

Julia Newbould
Managing editor,
Conexus Financial

11:40am - 12:30pm Platforms & technologies - how are they helping the licensee

Who else can help the licensees - what is the responsibility of providers?



Andrew Alcock
Chief executive
officer, HUB24



Matthew Rady
Chief executive
officer, BT



Darren Steinhardt
Managing director,
Infocus



Neil Younger
Managing director
and group chief
executive officer,
Fortnum Financial
Group



CHAIR

Chris Dastoor
Editor, Professional
Planner

12:30pm - 1:30pm Lunch

1:30pm - 2:20pm Looking inward/looking out

Bradley Betts will reveal where artificial intelligence is taking us in 2023, while our panellists reflect on what issues have been solved and where we should look from 2024 and beyond.



Bradley Betts
Managing director,
Member of global
equity research
team, Blackrock



Peter Bobbin
Consultant lawyer,
Coleman Greig
Lawyers



**Duncan
McPherson**
Chief executive
officer, Link Advice



CHAIR

Julia Newbould
Managing editor,
Conexus Financial

2:20pm - 3:10pm Speaking with power

What are the changes that the industry needs, what needs to be done? How do we make a commitment and develop these into concrete steps.



Sarah Abood
Chief executive
officer, FAAA



**Adrian
Gervasoni**
Executive manager -
Advice solutions,
Industry Fund
Services



Michael Wright
Chief executive
officer, Lonsec
Holdings



CHAIR

Simon Hoyle
Group publisher,
Conexus Financial

3:10pm - 5:00pm Conference close - Coach transfers to Sydney Airport
