Agenda

Tuesday, June 18

8:30am - 10:15am **Coach transfer from Sydney Domestic Airport to Hydro Majestic**

9:45am - 10:30am **Morning tea on arrival and registration**

10:30am - 10:40am **Welcome and introduction**


CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

10:40am - 11:40am **Panel: The big picture for financial advice licensing**

How the licensee industry has responded to the competitive and regulatory challenges of the past 12 months. What have been the big wins for the industry, and where has it fallen short? What impact has the changing focus of the regulator had on what licensees and advisers do, and how they do it?

Includes: Table discussion

Andrew Alcock
Managing director and chief executive,
HUB24

Eric Blewitt
Chief executive,
Investment Trends

Daniel Shrimski
Managing director,
Vanguard Australia

Neil Younger
Chief executive,
Fortnum Financial Group


CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

11:40am - 12:25pm

Case study: Collaboration and competition in an open **architecture world**

The once dominant model of vertical integration has given way to a new landscape of open architecture, in which licensees, advice firms, platforms, researchers and asset managers are willing to share revenue and collaborate to achieve better client outcomes. This session examines how the global wealth management trends of personalisation and ‘portfolio over product’ are playing out in the context of Australian managed accounts and goes behind the scenes of a historic commercial deal.

Chantal Giles
Managing director, head of wealth Australasia, BlackRock

Matt Lawler
Group executive, advice, AMP

Michael Wright
Chief executive officer, Lonsec Holdings

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

12:25pm - 1:25pm	**Lunch | The Wintergarden**

1:25pm - 2:10pm **Fireside chat: Meet the new ASIC Commissioner**

In one of his first public appearances, newly appointed Commissioner of the Australian Securities and Investments Commission and former Choice CEO **Alan Kirkland** outlines the priorities in his new role and how he plans to draw on experience from his previous position as a consumer advocate to the task of regulating the financial advice industry.

Alan Kirkland
Commissioner, ASIC

CHAIR

Simon Hoyle
Editor at large, Conexus Financial

2:10pm - 2:50pm **Panel: Crime and punishment under the new CSLR regime**

A deep dive into the work and objectives of the Australian Financial Complaints Authority and the Compensation Scheme of Last Resort, the latter having just commenced operations. AFCA will discuss its approach to external dispute resolutions, including its latest Dixon Advisory test case and the CSLR will go in depth about how its levy is forecasted.

David Berry
Chief executive, CSLR

Shail Singh
Lead ombudsman – investments and advice, AFCA


CHAIR

Chris Dastoor
Editor, Professional Planner

2:50pm - 3:15pm	Afternoon tea

3:15pm - 4:00pm **Panel: Efficiencies and best practice in tech and cyber**

As technology continues to play a pivotal role in the industry, it's essential to leverage it effectively while preserving the human touch where it matters most. This session will discuss strategies for augmenting technology to enhance accessibility and efficiency, while ensuring that human expertise remains central to the client-adviser relationship. Additionally, we'll examine AI use-cases in financial advisory, highlighting how machine learning algorithms can optimise client interactions and decision-making processes. Furthermore, we'll highlight the importance of cybersecurity even in small advice practices, and ensuring licensees adopt robust measures to safeguard sensitive client data and maintain trust in digital transactions.

Jason Brown
Head of distribution, BT

Nathan Jacobsen
Chief executive, Vital Business Partners; former Diverger CEO

Indi Siriniwasa
Chief executive, Alchemy Cyberdefence


CHAIR

Chris Dastoor
Editor, Professional Planner

4:00pm - 5:00pm **Panel: Winning in the Retirement Income Covenant era**

Australia is on the precipice of a demographic wave, as advisers, licensees and super funds assist millions of Australians transition to retirement. Looking across comprehensive advice as well intra-fund and the emerging models enabled by the Quality of Advice Review, this session will explore how advisers, super funds, platforms and other retirement providers are competing and collaborating to take advantage of new innovations in the age of the Retirement Income Covenant and meet regulatory and community expectations.

Includes: Table discussion

Anne Fuchs
Executive general manager - advice, guidance and education, Australian Retirement Trust

Adrian Gervasoni
Executive manager, advice solutions, Industry Fund Services

Andrew Gregory
Head of financial advice and education, UniSuper

Edwina Maloney
Group executive, platforms, AMP

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

5:00pm - 5:05pm	**Day one close**

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

5:10pm - 5:20pm	**Bus to Lilianfels**
6:15pm - 7:00pm	**Pre-dinner drinks | Lilianfels Lounge**
7:00pm - 10:00pm	**Conference dinner | Darley's restaurant, Lilianfels**

Wednesday, June 19

8:30am - 8:40am	**Bus to Hydro Majestic**
8:30am - 8:55am	**Arrival refreshments**
8:55am - 9:00am	**Welcome back**

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

9:00am - 9:45am   Keynote: State of the Licensee Market

CoreData founder and global CEO **Andrew Inwood** presents industry-standard research, providing the most comprehensive and thought-provoking insights into the drivers of licensee growth, how the needs of advisers are evolving, and whether licensees are truly meeting them.

Andrew Inwood
Global chief executive officer, CoreData Group

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

9:45am - 10:05am   International Keynote: Unlocking value in advice practices

Reflecting on his work with advice practices abroad, Franklin Templeton's **Robert Crossley** will unpack and analyse broader trends shaping the business of advice and how these follow through to transactions within M&A.

Robert Crossley
VP - EMEA/APAC head of industry advisor services, Franklin Templeton

10:05am - 10:40am   Panel: Show me the money! Latest trends in advice M&A

The state of the advice practice market – a review of current valuations, multiples and profitability, and what this means for access to funding (both debt and equity) for M&A activity. This panel will hear from the providers of capital into firms and from the facilitators of those deals.

Paul Barrett
Group chief executive, AZ Next Generation Advisory

Robert Crossley
VP - EMEA/APAC head of industry advisor services, Franklin Templeton

David Haintz AM
Partner, Merchant Australia

Jaime Johns
Managing director,

Simon Hoyle
Editor at large,

Avanzare Group

CHAIR

Conexus Financial

10:40am - 11:10am **Morning tea**

11:10am - 11:45am **Fireside chat: Meet the new Insignia CEO**

In a fireside chat, new Insignia Financial CEO **Scott Hartley** discusses the challenges and opportunities facing the business in a fast-changing world, and how the strategy at Insignia will differ from his previous homes at AMP and Sunsuper.

Scott Hartley
Chief executive, Insignia Financial

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

11:45am - 12:30pm **Panel: One industry, many models**

The competitive landscape of financial advice supports a multitude of different licensee business models. We hear from the leaders of a listed licensee group, an institutional licensee, a privately owned licensee in the midst of transition and an institutionally owned risk-focused licensee about the pros and cons of each model.

Keith Cullen
Founder and managing director, WT Financial Group Limited

Jasia Fabig
Chief executive, Fitzpatricks Private Wealth

Sandhya Maini
Head of Zurich Assure, Zurich

Darren Whereat
Chief advice officer, Rhombus Advisory (Insignia Financial)

CHAIR

Chris Dastoor
Editor, Professional Planner

12:30pm - 1:30pm **Lunch | The Wintergarden**

1:30pm - 2:15pm **Panel: Maximising outsourcing and partnerships**

As licensees transition to being providers of professional services to advice firms, they're finding they can't offer every service a practice needs. This session will dissect how licensees can partner with third parties to add services to their offering, and how these are structured and delivered to advisers. With offshoring services becoming a greater trend the panel will discuss which services are best suited to be situated overseas.

Mark Fisher
Chief executive,
Godfrey Pembroke

Lena Ridley
Chief executive,
Profile Financial Services

Angus Woods
Managing director,
Adviser Ratings

CHAIR

Simon Hoyle
Editor at large,
Conexus Financial

2:15pm - 3:15pm   The future of advice and role for licensees

The key issues covered in the past two days, and how the licensee community will respond. An opportunity to consolidate the key points covered in the summit and form a consensus view on how to address these issues and opportunities.

Includes: Table discussion

Anne Fuchs
Executive general manager - advice, guidance and education,
Australian Retirement Trust

Matt Lawler
Group executive,
advice, AMP

Jacqui Lennon
Head of retail,
Zurich Life Insurance

Geoff Lloyd
Chair, DASH Technology Group

CHAIR

Colin Tate AM
Founder and managing director,
Conexus Financial

3:15pm - 3:20pm   Summit close

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

CHAIR

3:20pm - 5:30pm	**Coach transfers to Sydney Domestic Airport**