

Agenda

Monday, June 23

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 remarks**



Aleks Vickovich

Editor-in-Chief,
Conexus Financial

CHAIR

10:40am - 11:30am **Panel: Big picture in financial advice licensing**

The opening panel will set the scene for forthcoming and constructive debate about licensee business models, commercial opportunities and threats and the key demographic, secular and regulatory trends affecting licensees, advisers and their clients. **Includes table discussion.**



Jason Collins

Head of Australia,
BlackRock



Mark Fisher

CEO, Godfrey
Pembroke



Edwina Maloney

Group executive -
platforms, AMP



Darren Steinhardt

Founder and
managing director,
Infocus



Aleks Vickovich

Editor-in-Chief,
Conexus Financial

CHAIR

11:30am - 12:05pm **Keynote: Regulatory priorities in financial advice**

The Australian Securities and Investments Commission will discuss its role in relation to the

regulatory framework for the financial advice profession, including changes to the reportable situations regime, as well as licensee obligations for AI and cybersecurity.



Alan Kirkland
Commissioner, ASIC



CHAIR

Chris Dastoor
Editor, Professional
Planner

12:05pm - 1:05pm Lunch

1:05pm - 2:00pm Case study: Entireti of an M&A deal

Last year saw the blockbuster M&A deal in which Entireti took ownership of the three largest AMP advice licensees, marking the end of institutional ownership dominating the largest licensees. This session will take delegates behind the scenes of the transaction and extrapolate the lessons for licensees and advice firms on securing private equity capital and forging new identities in a more decentralised market.



Paul Barrett
CEO, AZ NGA



Blair Vernon
Chief financial
officer, AMP



Neil Younger
CEO, Entireti



CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

2:00pm - 2:30pm TED Talk: Powering advice for an ageing population

In this keynote presentation, delegates will hear the learnings of a multi-year project working with advice firms and licensees to adapt advice at scale to cater to changing social demographics. It will cover how advice beyond 2025 will position advisers at the forefront of solutions to the unique challenges presented by retirement and the role for licensees as change agents, as well as the implications for advisers and licensees from expanded advice and nudges by super funds and the Retirement Income Covenant.



Andrew Lowe
Head of technical
services, Challenger



CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

2:30pm - 3:15pm

Panel: Harnessing productivity through emerging tech

This session will examine how licensees and advice firms can deploy capital expenditure to technology and innovation, without cost blowouts and excessive risk. It will consider how progressive advice providers are utilising AI developments to deepen client engagement or bolster profitability.



Terry Dillon
CEO, Shadforth
Financial Group



Matthew Rady
CEO, BT



Tanya Seale
Group executive
technology
solutions,
Centrepoint Alliance



Simon Hoyle
Editor, Retirement
Magazine

CHAIR

3:15pm - 3:45pm

Afternoon tea

3:45pm - 4:30pm

Panel: Role of licensees in closing the advice gap

The proposed creation of a second tier of financial adviser, along with the expansion of the education pathway, creates two significant tailwinds for the growth of advisers. This session will explore business model and regulatory mechanisms for shoring up supply of advice while maintaining professional standards.



Keith Cullen
CEO, WT Financial
Group



Matt Fogarty
Executive general
manager – strategic
partnerships,
Infocus



Tim Kane
Acting head of
retail, Zurich
Financial Services



Rachel White
Head of financial
adviser services,
Vanguard Australia



Chris Dastoor
Editor, Professional
Planner

CHAIR

4:30pm - 5:25pm

Panel: The wholesale and retail client opportunities

This session will consider the client segmentation, specialisation and growth opportunities created by the wholesale and retail client demarcation in the law. It will debate the public policy merits of the regime and unpack the investment and holistic advice provision ramifications.

Includes table discussion.



Matt Brown
CEO, Fortnum
Private Wealth &
Personal Financial
Services



Simon Carrodus
Partner, Hamilton
Locke



Paul Heath
CEO, Koda Capital



Chris Lioutas
Co-CEO and CIO,
Genium Investment
Partners



Simon Hoyle
Editor, Retirement
Magazine

CHAIR

5:25pm - 5:30pm **Day one: Closing remarks**

Closing remarks



Aleks Vickovich
Editor-in-Chief,
Conexus Financial

CHAIR

5:30pm - 5:40pm **Bus to Lilianfels**

6:30pm - 7:30pm **Pre-dinner drinks | Lilianfels lounge**

7:30pm - 10:00pm **Conference dinner | Darley's Restaurant, Lilianfels**

Tuesday, June 24

8:30am - 8:55am **Bus to Hydro Majestic**

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

9:00am - 10:00am

In conversation: The sustainability of client remediation

The blowing out of the Compensation Scheme of Last Resort will see advisers on the hook for several hundred million dollars in remediation over the next few years unless the legislation governing the scheme is reformed. This session will provide the summit with an exclusive update on the regime and next steps following a federal election. **Includes table discussion.**



David Berry
CEO, Compensation
Scheme of Last
Resort



Shail Singh
Lead ombudsman -
investments and
advice, AFCA



Chris Dastoor
Editor, Professional
Planner

CHAIR

10:00am - 10:30am TED Talk: How retirement and advice are disrupting the superannuation landscape

Retirement and financial advice are combining to redefine the flow of member capital in the superannuation sector. And these trends are set to accelerate. Drawing from The Conexus Institute's renowned State of Super research, this theme is unpacked in a TED talk and then explored in an open forum setting.



Dr David Bell
Executive director,
The Conexus
Institute



Aleks Vickovich
Editor-in-Chief,
Conexus Financial

CHAIR

10:30am - 11:00am Morning tea

11:00am - 11:45am Keynote: Competitive dynamics in the licensee landscape

This much-anticipated session – a tradition at the Licensee Summit – unveils market-leading annual research on the leading licensee business models and financial adviser satisfaction. It will also provide a comparative analysis with financial services sub-sectors such as superannuation and managed accounts.



Andrew Inwood
Global CEO,
CoreData Group



Aleks Vickovich
Editor-in-Chief,
Conexus Financial

CHAIR

11:45am - 12:30pm Panel: Licensee models in the new era of advice

This session will explore how major licensee models have evolved over the past five years in response to a rapidly shifting regulatory landscape. It will examine how these firms are driving new opportunities for advice practices through M&A activity, technology, and expanded service offerings, shaping the future of financial advice in Australia.



Hugh Humphrey
CEO, Count



Andrew Inwood
Global CEO,
CoreData Group



Peter Ornsby
Director – practice
management,
Rhombus Advisory



Chris Dastoor
Editor, Professional
Planner

CHAIR

12:30pm - 1:30pm Lunch

1:30pm - 2:15pm Panel: The rise and rise of managed accounts

This session will explore the exponential growth in separately managed accounts and managed discretionary accounts on and off platform. It will address regulatory debates, investor benefits and the ways in which licensees can and should become participants in the booming market.



Nigel Baker
Managing director
and financial
adviser, Arch Capital



Ian Holliday
Head of research &
managed accounts,
Lifespan



Marc Hraiki
GM, Adviser
Solutions, Evidentia
Group



Simon Hoyle
Editor, Retirement
Magazine

CHAIR

2:15pm - 3:15pm Panel: The road ahead for advice and licensing

The final session of the summit will draw out its central conclusions and throw forward to the next steps for industry collaboration across commercial, regulatory, professional and community spheres. It will take a leadership position and examine the health and hygiene of the licensee

landscape. **Includes table discussion.**



Andrew Alcock
CEO and managing
director, HUB24



Jasia Fabig
CEO, Fitzpatricks
Private Wealth



Matt Lawler
CEO, Akumin
(Entireti Group)



Aleks Vickovich
Editor-in-Chief,
Conexus Financial

3:15pm - 3:25pm

Closing remarks



Aleks Vickovich
Editor-in-Chief,
Conexus Financial

3:25pm - 5:30pm

Coach transfers to Sydney Domestic Airport