Agenda - 2025 Licensee Summit

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**



CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

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



CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

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



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



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



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



CHAIR

Simon Hoyle
Editor, Retirement Magazine

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



CHAIR

Chris Dastoor
Editor, Professional Planner

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



CHAIR

Simon Hoyle
Editor, Retirement Magazine

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

Closing remarks



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

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



CHAIR

Chris Dastoor
Editor, Professional Planner

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



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

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



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

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



CHAIR

Chris Dastoor
Editor, Professional Planner

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



CHAIR

Simon Hoyle
Editor, Retirement Magazine

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)



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

3:15pm - 3:25pm **Closing remarks**



CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

3:25pm - 5:30pm **Coach transfers to Sydney Domestic Airport**
