

# 2025 Licensee Summit

## 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

**Aleks Vickovich**

Editor-in-Chief,



**Darren Steinhardt**  
Founder and  
managing director,  
Infocus



CHAIR

Conexus Financial

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**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

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**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

CHAIR

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**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

CHAIR

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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

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3:15pm - 3:45pm

**Afternoon tea**

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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



**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

CHAIR

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3:15pm - 3:25pm

## Closing remarks



**Aleks Vickovich**  
Editor-in-Chief,  
Conexus Financial

CHAIR

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3:25pm - 5:30pm

## Coach transfers to Sydney Domestic Airport