

10-11 June 2026 | Blue Mountains, NSW

2026 Licensee Summit

Agenda

Wednesday, June 10

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

10:30am - 10:45am **Welcome remarks**

10:45am - 11:45am **Panel: Big picture in financial advice demand, supply and oversight**

The opening session will set the scene for two days of constructive debate, examining the macro forces reshaping the licensee landscape. It will interrogate the big-picture commercial, regulatory, and demographic trends bearing down on licensees and will explore how these pressures impact the industry's journey toward a sustainable model of 300 clients per adviser, and the broader ambition to grow the profession to 20,000 advisers.

Includes table discussion



Keith Cullen

Founder and managing director, WT Financial Group



Hugh Humphrey

Chief executive, Count



Edwina Maloney

Group executive - platforms, AMP



Rachel White

Head of financial adviser services, Vanguard Australia



Aleks Vickovich

Editor-in-chief, Conexus Financial

CHAIR

11:45am - 12:30pm **Ted Talk: The AI revolution beyond file notes**

Artificial intelligence is moving from experiment to implementation across the advice profession. This session examines how licensees are deploying AI tools, the regulatory and compliance obligations that come with AI adoption, and where licensees can add meaningful capacity to the advice process through intelligent automation.



Matt Heine
Chief executive,
Netwealth



Kailee Maloney
Head of Australia,
Marloo

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

1:30pm - 2:15pm **Panel: How tech-enabled licensees are driving efficiency and scale**

Technology, including AI, is reshaping how advice practices operate, how advice is delivered and where capacity can be unlocked across the advice process, and whether less is more when it comes to technology vendors.

2:15pm - 3:00pm **Operational resilience in an era of escalating cyber threats**

Cybersecurity has rapidly emerged as one of the most critical operational risks facing licensees today. This session will explore practical frameworks for building cyber resilience across advice businesses, examine the regulatory obligations licensees are required to meet, and unpack how those obligations flow through to the advice practices operating within their networks.



Matt Lawler
Chief executive,
Akumin



Darren Whereat
Chief executive,
Rhombus Advisory



Aleks Vickovich
Editor-in-chief,
Conexus Financial

CHAIR

3:00pm - 3:30pm **Afternoon tea**

4:00pm - 4:40pm **Fostering constructive collaboration with AFCA and the CSLR**

This session will explore the interconnected roles of AFCA and the CSLR in fostering a fair and accountable financial advice ecosystem. The session will also consider how the

profession can constructively engage with each body to strengthen accountability frameworks, resolve disputes more efficiently, and ensure the CSLR remains a meaningful safety net without placing undue burden on compliant practitioners.



David Berry
Chief executive,
Compensation
Scheme of Last
Resort



Shail Singh
Lead ombudsman -
investments and
advice, AFCA



Chris Dastoor
Editor, Professional
Planner

CHAIR

4:40pm - 5:30pm

In conversation: Life, leadership and licensees

This interview will feature candid insights from one of the financial services industry's leading business minds. It will reflect on the past, present and future of wealth management across financial advice, licensing, managed accounts, research and investments, while also drawing out key lessons on leadership, management and mentorship.



Rob Coombe
Executive chair,
Generation
Development Group



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

Thursday, June 11

8:30am - 8:55am

Bus to Hydro Majestic

8:55am - 9:00am

Opening remarks

9:00am - 9:45am

Keynote: Future and emerging licensee business models

CoreData Research founder Andrew Inwood presents annual research on the leading

licensee business models and financial adviser satisfaction, alongside the latest on the adjacent managed accounts, asset consulting and platform markets.



Andrew Inwood
Global chief executive, CoreData Group



Aleks Vickovich
Editor-in-chief, Conexus Financial

CHAIR

9:45am - 10:45am Panel: Licensee business models in practice

This session will follow on from the CoreData presentation and explore the continuing evolution of licensee models and 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.

Includes table discussion



Jeff Thurecht
Director, Evaluesco Financial Services



Chris Dastoor
Editor, Professional Planner

CHAIR

10:45am - 11:15am Morning tea

11:15am - 12:05pm Panel: The emerging retirement ecosystem

The Retirement Income Covenant and the expanding advice obligations of super funds are reshaping how retirement is served in Australia. This session examines how licensees can position their adviser networks at the forefront of retirement income solutions and what the competitive and regulatory landscape means for the advice profession's role in retirement.



Felipe Araujo
Chief executive, Generation Life



Kate Farrar
Chief executive, Brighter Super



Francis Rigby
Group executive financial planning, Centrepont Alliance



Dr David Bell
Executive director, The Conexus Institute

CHAIR

12:05pm - 12:50pm Navigating AFSL obligations and volatile markets in managed accounts

Managed accounts have become one of the most powerful tools in the modern advice practice and private credit has emerged as one of the most talked-about asset classes in adviser portfolios. This session examines how licensees can maintain sufficient due diligence over these products.



Darren Steinhardt
Founder and managing director, Infocus



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

12:50pm - 1:50pm Lunch | Wintergarden Restaurant

1:50pm - 2:50pm Panel: Investment and advice governance in a post-Shield, First Guardian world

This session will examine whether large licensees possess the necessary capabilities to effectively oversee their advisers, and whether ASIC has the capacity to conduct sufficient due diligence across the thousands of self-licensed practices operating throughout the country. The discussion will explore how all parts of the value chain can better coordinate and self-regulate to proactively identify emerging issues with facts and evidence. Includes table discussion



Annika Bradley
Head of advice strategy, research and technical, UniSuper



Lisa Chambers
Chief risk officer, Count



Lorraine Robinson
Chief executive, Lonsec



CHAIR

Chris Dastoor
Editor, Professional Planner

2:50pm - 3:35pm Panel: Licensing, community and the emerging advice ecosystem

The panel will examine the various pathways consumers can take toward retirement, exploring ways to expand the influence and reach of financial advice while strengthening its public standing and community impact. Discussion will encompass key areas

including general advice, insurance, superannuation, and behavioural finance, before concluding with an in-depth look at the central debates and considerations surrounding licensee business models and their long-term prosperity.



Andrew Alcock
Chief executive and
managing director,
HUB24



Peter Chun
CEO, UniSuper



Neil Younger
Group chief
executive, Entireti



Aleks Vickovich
Editor-in-chief,
Conexus Financial

CHAIR

3:35pm - 3:40pm

Closing remarks

3:40pm - 5:40pm

Coach transfers to Sydney Domestic Airport and Sydney Central