Agenda - 2026 Licensee Summit

Wednesday, June 10

8:30am - 10:30am	**Coach transfer from Sydney Domestic Airport to Hydro Majestic**
10:30am - 10:40am	**Welcome remarks**
10:40am - 11:55am	**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



Andrew Alcock
Chief executive and managing director, HUB24



Paul Barrett
Chief executive, AZ Next Generation Advisory



Keith Cullen
Founder and managing director, WT Financial Group



Hugh Humphrey
Chief executive, Count



Edwina Maloney
Group executive – platforms, AMP



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

11:55am - 12:40pm	**In conversation: 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



CHAIR

Chris Dastoor
Editor, Professional Planner

12:40pm - 1:40pm **Lunch | Wintergarden Restaurant**

1:40pm - 2:25pm **Case study: 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



CHAIR

Geoff Lloyd
Chair, Conexus Financial

2:25pm - 3:10pm **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.



Belinda Barclay
General manager, advice and governance, Oreana Partnerships



Terry Dillon
Chief executive, Shadforth Financial Group



Tim Kane
Head of retail, Zurich Financial Services



Darren Steinhardt
Founder and managing director, Infocus



CHAIR

Chris Dastoor
Editor, Professional Planner

3:10pm - 3:40pm

	Afternoon tea

3:40pm - 4:40pm	**Panel: 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.

Includes table discussion



Graeme Hibbert
Head of cybersecurity governance, Westpac Group



Nathan Jacobsen
Chief operating officer, AZ Next Generation Advisory



Matt Lawler
Chief executive, Akumin



Darren Whereat
Chief executive, Rhombus Advisory



CHAIR

Simon Hoyle
Editor, Retirement Magazine

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



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

5:30pm - 5:40pm	**Closing remarks**
5:40pm - 5:55pm	**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



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

9:45am - 10:30am	**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.



John Nantes
Executive director, Godfrey Pembroke



Jeff Thurecht
Director, Evalesco Financial Services



Andrew Wilkie
Director - branches, Morgans



CHAIR

Chris Dastoor
Editor, Professional Planner

10:30am - 11:00am **Morning tea**

11:00am - 11:40am **Case Study: The emerging architecture of global advice**

The structural pressures reshaping wealth management are not unique to Australia — but how Australian licensees respond to them will define the next decade. Drawing on BlackRock's vantage point across global wealth markets, this session examines the operational and cultural shifts redefining how advice businesses are built, scaled, and governed.

From the evolution of digital advice infrastructure to the reimagining of due diligence as technology raises expectations around consistency transparency, this session will interrogate what operational maturity for licensees and advice firms can look like at scale.



John Carnevale
Executive general manager research and investment services, Entireti



James Verner
Managing director, head of aladdin wealth tech APAC, BlackRock



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

11:40am - 12:40pm **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

Simon Hoyle
Editor, Retirement Magazine

12:40pm - 1:40pm

Lunch | Wintergarden Restaurant

1:40pm - 2:30pm **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, Centrepoint Alliance



Rachel White
Head of financial adviser services, Vanguard Australia



CHAIR

Dr David Bell
Executive director, The Conexus Institute

2:30pm - 3:30pm **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.

Includes table discussion



Andrew Gregory
Chief advice officer, UniSuper



Nick Hamilton
Managing director and chief executive, Challenger



Geoff Lloyd
Chair, Conexus Financial



Neil Younger
Group chief executive, Entireti



CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

3:30pm - 3:40pm	**Closing remarks**
3:40pm - 5:40pm	**Coach transfers to Sydney Domestic Airport**