Agenda - 2024 Researcher Forum

Monday, December 2

8:00am - 10:00am	**Coach transfer from Sydney Domestic Airport to Hydro Majestic**
9:45am - 10:30am	**Registration and networking morning tea**
10:30am - 10:40am	**Welcome and introduction**

CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

10:40am - 11:50am **Panel: Big picture in financial advice research and portfolios**

This opening panel will feature leaders who represent different parts of the financial advice ecosystem. It will delve into how the landscape has shifted for investment research and portfolio construction at adviser level and ask what advisers and their clients ultimately want from service providers in the research and managed accounts ecosystem.

Includes table discussion

Jacqueline Fernley
Chief investment officer, Mason Stevens

Matt Lawler
Group executive, advice, AMP

Michael Wright
Chief executive officer, Lonsec Holdings

CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

11:50am - 12:30pm **Keynote: The rise and rise of asset consultants (part 1)**

This session will feature exclusive new research on the size and shape of the asset consulting industry adjacent to financial advice in Australia, as well as sentiment from advisers about how they work with asset consultants and research houses, their level of satisfaction and emerging trends in the market.

Andrew Inwood
Global chief executive officer, CoreData Group

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

12:30pm - 1:30pm **Lunch**

Immersive sit-down lunch with delegates at the famous Wintergarden Restaurant overlooking picturesque Megalong Valley.

1:30pm - 2:15pm **Panel: Rise and rise of asset consultants (part 2)**

This panel will debate and discuss the issues raised in the previous session and hear from a diverse range of stakeholders about the dynamics in the asset consulting space, including best practice investment governance, the influence of external consultants in the creation and implementation of approved product lists and managed accounts, how they interact with other stakeholders including responsible entities and wealth platforms, and any conflicts of interest or room for improvement in the ecosystem.

Claire Casucci
Principal consultant, Frontier Advisors

Jo Cornwell
Head of manager research, Evidentia

Alex Donald
Chief executive - investment solutions, Ironbark Asset Management

Tim Murphy
Co-CEO/head of research, Genium Investment Partners

CHAIR

Simon Hoyle
Editor, Investment Magazine

2:15pm - 2:45pm **Case studies: Harnessing the power of AI in**

investments

This session will examine cutting edge developments in artificial intelligence and their application for investment processes, including research and ratings, rules-based and quantitative investment strategies, portfolio construction and client engagement.

Michael O'Leary
Distinguished quantitative analyst, Morningstar

CHAIR

Chris Dastoor
Editor, Professional Planner

2:45pm - 3:15pm **Afternoon tea**

3:15pm - 4:15pm **Workshop: Asset allocation in volatile times**

This session will ask leading asset managers to put forward one big investment idea, strategy or opportunity they believe is well-suited to the current and forward market dynamic, outlining their house investment outlook in the process. Delegates will interrogate the ideas put forward and participate in hypothetical exercises, drawing out the implications and relevance of the theses to financial advice client portfolios.

Includes table discussion

Rob Prugue
Founder, Callidum Investment Research; Honorary Industry Fellow, University of Technology Sydney

Sam Ruiz
Portfolio specialist, T. Rowe Price

Chris Siniakov
Managing director, Australia fixed income, Franklin Templeton

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

4:15pm - 5:10pm **In conversation: Profiles in hope**

In this candid session, leading mental health advocates John Brogden AM, Tim Hewson and Colin Tate AM will discuss the landscape around wellness and suicide prevention, with a focus on the unique health challenges facing executives, entrepreneurs and small business owners. Brogden and Hewson will also share their personal insights into Australian politics and the financial

services industry.

John Brogden AM
Honorary president, Lifeline International

Tim Hewson
Director and founder, Betterment Consulting and Mongrels Men

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

5:10pm - 5:15pm **Closing remarks day 1**

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

5:25pm - 5:35pm **Coach transfer from Hydro Majestic to Lilianfels**

6:00pm - 7:00pm **Pre-dinner drinks | Lilianfels Lounge**

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

Tuesday, December 3

8:30am - 8:40am **Coach transfer from Lilianfels to Hydro Majestic**

8:55am - 9:00am **Welcome back**

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

9:00am - 9:40am **Keynote: Regulatory focus on choice super architecture**

This session featuring a senior regulatory official will analyse ASIC’s report 779 on superannuation choice products and explain the implications for financial advice providers, super

trustees and their suppliers and trusted confidants. It will provide clarity to the market on the regulatory climate as it pertains to so-called choice products and managed accounts.

Alan Kirkland
Commissioner, ASIC

CHAIR

Aleks Vickovich
Editor-in-Chief,
Conexus Financial

9:40am - 10:40am **Workshop: Building consensus on investment performance**

This interactive session will feature insights from The Conexus Institute on measurement of investment performance and what wholesale and retail financial advisers and their suppliers and consultants can learn from live debates in the institutional market. Delegates will debate the implications of extending Your Future Your Super to choice products, and explore practices in the managed account sector.

Includes table discussion

Angela Ashton
Director and founder, Evergreen Consultants and Evergreen Ratings

Kirby Rappell
Executive director, SuperRatings

CHAIR

Dr David Bell
Executive director, The Conexus Institute

10:40am - 11:10am **Morning tea**

11:10am - 11:55am **Panel: Democratising access to private markets and alternatives**

This panel session will examine levels of demand and access to alternative investments and private markets for financial advisers, tapping into global trends, technological developments and the implications for investment researchers and consultants. It will delve into the thorny issue of private asset valuations and transparency.

Rebecca Jacques
Head of wealth management investment solutions, Mercer Investments

Michael Karagiannis
Head of wealth, JANA Investment Advisers

Norman Zhang
Chief investment officer, Koda Capital

CHAIR

Simon Hoyle
Editor, Investment Magazine

11:55am - 12:40pm **Panel: Customisation and future of managed portfolios**

This session will draw out the trends of personalisation and customisation that are sweeping global wealth management markets to assess how the local market should respond. It will also debate and discuss current dynamics in the managed account market and demand for the various sub-categorisations and incarnations.

Rob da Silva
Head of research, Research IP

Jason Entwistle
Director strategic development, HUB24

Matt Hattersley
Head of dealer group engagement, SQM Research

Jonathan Tolub
Director, InvestSense

CHAIR

Chris Dastoor
Editor, Professional Planner

12:40pm - 1:40pm **Lunch**

Immersive sit-down lunch with delegates at the famous Wintergarden Restaurant overlooking picturesque Megalong Valley.

1:40pm - 2:25pm **Panel: The advice ecosystem's role in solving the retirement challenge**

This panel session will delve into the challenges facing Australia in building a world-class system for the decumulation phase of superannuation and the role for financial advisers and their suppliers/confidants in helping more people achieve a dignified retirement. It will examine the problems of rating and assessing retirement income products and breaking down the notorious complexity of the longevity puzzle.

Dr David Bell
Executive director, The Conexus Institute

Ian Fryer
General manager, Chant West

Matt Olsen
Director of manager research ratings, Morningstar Australasia

CHAIR

Simon Hoyle
Editor, Investment Magazine

2:25pm - 3:25pm

Workshop: 50 years of investment research (and where to next)

This session will reflect of how the investment advice, managed funds research, multi-asset multi-manager portfolios and consulting landscape have – and have not – evolved and developed over the 50 years since their effective inception.

Reflecting on our shared history and drawing on the key themes of the forum as the basis of where we are today and what we can plan and look forward to, we will consider the commercial and community collaboration opportunities ahead. We will do this by engaging in an interactive SWOT analysis that will enable each participant to maximise their key take-outs from the forum and the zero in on the future impact of their role and that of their organisation.

Includes table discussion

Graham Rich
Managing partner and dean, Portfolio Construction Forum

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

3:25pm - 3:30pm

Conclusion and closing remarks

CHAIR

Aleks Vickovich
Editor-in-Chief, Conexus Financial

3:30pm - 3:45pm

Coach transfer to Sydney Domestic Airport