Agenda

Tuesday, December 2

8:00am - 10:00am **Coach transfer from Sydney Domestic Airport or Central Station to Hydro Majestic**

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

10:30am - 10:40am **Welcome and introduction**


CHAIR

Aleks Vickovich
Editor-in-chief,
Conexus Financial

10:40am - 11:20am **In conversation: Leadership, performance and the future of wealth management**

Generation Development Group's acquisitions of both Lonsec and Evidentia mark two of the most significant corporate developments in the Australian wealth management landscape. In a candid conversation, GDG CEO Grant Hacket will discuss the emerging powerhouse's corporate strategy and outlook for the business of investment research, asset consulting and managed accounts. It will also reflect on career trajectory from world-renowned Olympian to financial services leader.

Grant Hackett OAM
Chief executive,
Generation Development Group


CHAIR

Aleks Vickovich
Editor-in-chief,
Conexus Financial

11:20am - 12:20pm **Panel: Big picture in advice, research and managed accounts**

This opening panel will dissect the big trends in the commercial landscape for financial advice, drawing out the implications for trusted service providers including licensees, research houses, asset consultants and platforms. It will set the scene for the summit and take a leadership position on key themes including rising regulatory scrutiny, shifting business models and ongoing market volatility.

Includes table discussion

Josh Persky
Founder and chief executive, Briefcase

Aman Ramrakha
Chief investment officer, Entireti

Lorraine Robinson
Chief executive, Lonsec Research

Jamie Wickham
Partner, Minchin Moore Private Wealth

CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

12:20pm - 1:20pm **Lunch**

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

1:20pm - 2:00pm **Keynote: Priorities in regulatory enforcement**

The corporate regulator will discuss its role in oversight of the financial advice chain as the role of advisers, licensees, platforms and researchers have all come into question. Additionally, this session will hear updates on other regulatory priorities including private markets and managed accounts.

Alan Kirkland
Commissioner, ASIC

CHAIR

Chris Dastoor
Editor, Professional Planner

2:00pm - 2:30pm **Ted talk: The fiduciary gap**

This session will examine the structural drift occurring across the investments and wealth ecosystem — and will reassert the proposition that fiduciary duty is a broadly applied principle of stewardship, not just client service. The presentation will identify early warning signals and consider how the forces of independence, optionality and consolidation have collided, with implications for ethical decision making and business operations.

Graham Rich
Managing partner and dean, Portfolio Construction Forum

CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

2:30pm - 3:25pm

Panel: Gatekeeping, due diligence and professionalism in investment advice

This panel will reflect on the previous two session and discuss and debate due diligence role of "gatekeepers" including professional advisers, licensees, platforms and researchers to ensure a high-quality ecosystem for investment funds. It will assess two policy proposals regarding the Delivering Better Financial Outcomes and Compensation Scheme of Last Resort reforms, drawing out the implications for consumers, advisers and their service providers.

Sarah Abood
Chief executive, Financial Advice Association Australia

Chris Gosselin
Chief executive, Australian Fund Monitors

Scott Hartley
Chief executive, Insignia Financial

Xavier O'Halloran
Chief executive and founding director, Super Consumers Australia

CHAIR

Chris Dastoor
Editor, Professional Planner

3:25pm - 3:55pm

Afternoon tea

3:55pm - 5:30pm

Workshop: Building resilient portfolios in an age of noise and complexity

In this interactive session, leading asset managers will put forward an investment idea that they believe is suited to the current market and how and why it should be included in portfolios. Their theses will then be interrogated by a panel of researchers and consultants. Finally, delegates will participate in a hypothetical portfolio construction process, engaging with the theses presented and questioning the relevance of traditional asset allocation in an unorthodox macro environment.

Includes table discussion

Presenting panel

Reece Birtles
Head of Australian equities, ClearBridge Investments

Francois de Bruin
Fund manager, global equities, Royal London Asset Management

Eric Marais
Investment specialist and head of clients – Australia, Orbis Investments

Helen Mason
Fund manager, fixed income Australia, Schroders


CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

3:55pm - 5:30pm

Research panel

Claire Casucci
Principal consultant, Frontier Advisors

Brad Matthews
Founding director, Brad Matthews Investment Strategies

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


CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

5:30pm - 5:50pm	**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**

Wednesday, December 3

8:10am - 8:30am	**Coach transfer from Lilianfels to Hydro Majestic**
8:30am - 8:50am	

Arrival refreshments

8:50am - 9:00am **Welcome remarks**


CHAIR

Aleks Vickovich
Editor-in-chief,
Conexus Financial

9:00am - 9:45am **Keynote: The role of gatekeepers in financial advice portfolios**

CoreData Research global chief executive Andrew Inwood will explore how advisers select and switch asset consultants, examine platform fee structures and transparency, and analyse the anatomy of a scam through the lens of the Shield and First Guardian collapses.

Andrew Inwood
Global chief executive, CoreData Group


CHAIR

Aleks Vickovich
Editor-in-chief,
Conexus Financial

9:45am - 10:30am **Case studies: Emerging asset consulting models**

Retail and wholesale asset consulting businesses have emerged as among the most attractive targets of corporate investors in the wealth management space, while a new investment governance ecosystem has sprouted to support a proliferation of independent financial advice firms. This session will showcase some established and start-up business models.

Tim Farrelly
Co-chief investment officer and head of asset allocation,
Delta Portfolios

Jonathan Tolub
Director,
InvestSense

Michael Wright
Chief executive,
Evidentia


CHAIR

Simon Hoyle
Editor, Retirement Magazine

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

11:00am - 11:35am **Keynote: Platforms, advisers and researchers – delivering investment outcomes in super**

Drawing on preliminary findings from new research alongside The Conexus Institute's extensive research and submissions on superannuation and institutional investment, this session explores the degree to which existing regulatory requirements are appropriate for platform supers, identifies possible gaps in the existing investment activity chain in the advised/consulted super platform model, and makes some predictions around the direction of regulation in these areas.

Dr David Bell
Executive director, The Conexus Institute

CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

11:35am - 12:35pm **Panel: Democratisation of private markets**

Rising investor and adviser demand for private market assets is leading to a flurry of technological and investment innovation as new mediums of access emerge. But regulators and central banks are ramping up warnings about these asset classes and scrutiny of holdings, especially by retail investors. This panel will examine the shifting landscape for unlisted investments and how these trends are affecting managed accounts and platform product development and consumption.

Includes table discussion

Alex Donald
Chief executive - investment solutions, Ironbark Asset Management

Dominic McCormick
Consultant, DPM Financial Services

Matt Olsen
Director of manager research ratings, Morningstar Australasia

Michael Watson
Director – wealth solutions, La Trobe Financial

CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

12:35pm - 1:35pm **Lunch**

Sit-down lunch with delegates at the famous Wintergarden Restaurant overlooking picturesque

Megalong Valley.

1:35pm - 2:25pm

In conversation: The mainstreaming of digital assets

The advent of SEC- and ASIC-regulated cryptocurrency exchange-traded funds, combined with heightened enthusiasm from central banks and institutional investors has created a milestone moment for digital assets and blockchain-based technologies. But appetite from Australian financial advisers remains vexed. This session will examine developments in the crypto market, bull and bear investment theses and the role for investment advice, research and product.

Includes table discussion

Andrew McPhee
Financial services industry lead, Swyftx


DIGITAL

Jonas Benner
Senior quantitative researcher, AMP


CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

2:25pm - 3:25pm

Workshop: Standardising separately managed accounts

A lack of standardised performance data in the SMA segment of the managed accounts market is an ongoing bugbear of advisers, presenting an opportunity for collaboration and innovation in the Researcher Forum community. This interactive session will strive to produce consensus on the SMA standardisation process and take a self-regulatory leadership position in aid of good investment governance and hygiene of the advice ecosystem.

Includes table discussion

Rebecca Jacques
Head of wealth management investment solutions, Mercer Investments

Simon Jeffery-Bilich
Head of investments, Count

Mark Watmore
Partner, NMG Consulting

Angus Woods
Managing director, Adviser Ratings


CHAIR

Simon Hoyle
Editor, Retirement Magazine

3:25pm - 3:30pm	**Closing remarks**
3:30pm - 5:00pm	**Coach transfer from Hydro Majestic to Sydney Domestic Airport or Central Station**