

# Agenda

Tuesday, December 2

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

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

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



**Aleks Vickovich**

Editor-in-chief,  
Conexus Financial

CHAIR

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**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 Hackett 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



**Aleks Vickovich**

Editor-in-chief,  
Conexus Financial

CHAIR

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**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



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

CHAIR

**2:30pm - 3:25pm**

**Panel: Gatekeeping, due diligence and professionalism in investment advice**

This panel will reflect on the previous two sessions and discuss and debate the 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



**Chris Dastoor**  
Editor, Professional  
Planner

CHAIR

**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



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

CHAIR

**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



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

CHAIR

**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

**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**