

ANNUAL CONFERENCE

Hobart, Tasmania
17 - 21 March 2025

Come Down for Air!
Aspire | Innovate | Revitalise

Monday, 17 March 2025

3.00 pm	Registration and hotel check-in	Hotel Lobby
7.00 pm	Welcome dinner – a casual coming together of friends 'Taste of Tasmania'	Boardwalk Gallery

Tuesday, 18 March 2025

6:00 am	Morning revitaliser Join fellow delegates and kickstart your day with a sunrise saunter (walk), morning dash (run) or mind, body and soul session (gentle movement, breathwork and mindfulness).	
From 6.30 am	Breakfast	Boardwalk Bistro
8.00 am	Partners tour departs	Meet hotel lobby
8.30 am	Master of Ceremony – Housekeeping / Set scene	Tasman Room
8.45 am	Welcome and opening , John Shuttleworth, Centrepont Alliance	Tasman Room
9.30 am	Where are we now, where we might be going and how best to get there? , Brian Parker, Australian Retirement Trust So far, based on the Cabinet appointments we've seen Trump 2.0 is likely to have profound and potentially troubling implication implications for world trade and economic growth and as well as bringing about major upheavals in the geopolitical landscape. The market reaction we've seen so far makes some sense - equity markets take it positively because they like deregulation and tax cuts, while bonds sell off because they hate higher inflation and higher deficits. On geopolitics, the conventional wisdom is that trump is a negative, but maybe, just maybe, having someone unpredictable in the White House gives malign actors across the globe pause for thought and maybe force them come to some kind of accommodation. How the world evolves in 2025 and beyond is (to put it mildly) decidedly unclear, and by the time of the conference, a scene setting presentation covering a broad swathe of the economic and geopolitical risks - as well as opportunities.	Tasman Room
10.30 am	Morning tea	Exhibition Foyer
11.00 am	Quickfire Challenge – Ignite Your Competitive Spirit! Get ready for Quickfire , a fast-paced, high-energy team challenge that will put your creativity, strategy, and problem-solving skills to the test! Armed with a tablet and a ticking clock, your team will race against time to complete a series of fun, mind-bending tasks—each worth valuable points. Will you play it safe or take bold risks to climb the leaderboard? Only the most dynamic, agile, and collaborative teams will emerge victorious. Let the games begin!	Tasman Room
12.30 pm	Lunch	Exhibition Foyer
	Lunch Bytes 12.45 pm – 1.00 pm - Filenote.ai	Wellington Room 1
	1.00 pm – 1.15 pm – Live Presso	Wellington Room 2

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1.30 pm	1	Business insurance trusts , Alex Koodrin, ClearView This presentation explains the structure of business insurance trusts; their application to buy/sell and key person capital and revenue purpose and personal insurance cover; discusses their tax and commercial advantages; and compares them with other business insurance ownership structures. Session includes practical case studies.	Wellington Room 1
	2	CLOs: Facts not fear , Teiki Benveniste, Fidante/Ares With several commentators predicting CLOs to become, like CDOs in 2008, a trigger for the next systemic shock to the financial sector. In this session we separate facts from fear to illustrate why we believe CLOs are unlikely to become the next catalyst for a financial crisis and highlight how they offer compelling relative value, with the following key takeaways - 1. CLOs and pre-Crisis CDOs are not the same, 2. CLO default risk is remote, 3. CLOs continue to offer attractive relative	Wellington Room 2
	3	Who do you think you are? , Michael Bonett, BT Understanding Personality Traits. This presentation will empower attendees to navigate their personal and professional lives more effectively by harnessing the insights provided by "Personality Plus." Join us for an enlightening session that promises self-discovery and growth!	Tasman Room
	4	The future of IT security for financial services firms , Greg Hansen, HUB24, Francis Rigby and Tanya Seale, Centrepoint Alliance Financial planning firms often lack the resources to maintain a robust in-house IT security team. Facing challenges such as outdated security systems, employee cybersecurity training, inadequate incident response strategies. Greg will provide insights to some of the common fraud and cyber breaches they encounter and offer ideas for advisers to reduce their risks. Tanya will share how we are partnering with firms to reduce operational risks, enhance compliance, and safeguard client data with a 24/7 Proactive Monitoring and Management framework.	Plenary Hall
2.30 pm	Transition		
	1	Navigating an evolving investment landscape , Matt Wachter, Morningstar As economic conditions shift, there's growing interest in how various growth and inflation scenarios could influence portfolios. In this Morningstar presentation, we'll explore the scenarios currently reflected in equity, fixed income, and currency markets, and what they signify for investors. We'll also discuss strategies for portfolio positioning and the importance of maintaining flexibility in today's environment.	Plenary Hall
2.35 pm	2	Bonds are back , Ryan Davis, Desktop Broker, Paul Ashworth, Bell Potter and Grady Wulff, Bell Direct/Desktop Broker Building fixed interest into direct equity portfolios - diversifying direct equity portfolios with fixed interest can be achieved in a number of methods, investment specialist Paul will discuss his strategies to achieving a well diversified portfolio by utilizing various fixed interest securities available on the ASX. Grady will also present Bell Potters markets update and provide two income producing stocks that Bell Potter have as buy ratings for advisers to consider for their clients portfolios.	Wellington Room 1

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	<p>Global growth shifts amidst ongoing policy uncertainty - Is it time to play defence?, Anthony Kirkham, Franklin Templeton/Western Asset</p> <p>During the session, Western Asset will provide insight into how it is navigating ongoing volatility in rates and credit markets and where it sees value. Revisiting the role that fixed income can play in a diversified portfolio, Western Asset will pose the question of whether it's time to take a more defensive stance in diversified portfolios and whether it pays to be active.</p>	Wellington Room 2
	<p>The 5 things every adviser needs to know about aged care advice, Jenneke Mills, MLC</p> <p>The data is clear – the population is ageing, the number of people over the age of 80 is set to dramatically increase, and the great wealth transfer is shaping up to be even more significant than first expected. It's inevitable that advisers will find an increasing need to discuss accommodation solutions with clients and their families, with residential aged care being one of the most common options. Whether or not you will personally provide aged care advice, you'll need to find a way to meet the aged care advice needs of your clients. Don't feel overwhelmed at the prospect of having to 'know it all'. In this session, we will cover the 5 things you need to know about aged care advice to help you on your journey.</p>	Tasman Room
3.35 pm	Afternoon tea	Exhibition Foyer
4.00 pm	<p>Developing a high-performance team, Grant Hackett, Generation Development Group</p> <p>Utilizing an executive and sporting career spanning 26 years, Grant provides individuals and teams the perfect framework on how to develop practical high-performance environments underpinned by key cultural attributes. These practical frameworks can be utilised for Business KPIs, structures to effectively manage teams, and provide the key attributes of high performance and how to measure, monitor and improve them.</p>	Tasman Room
5.00 pm	Partners tour returns	
5.00 pm	Summary and close	Tasman Room
6.45 pm	Transfer to offsite dinner	
7.00 pm	Offsite dinner at Glen Albyn Estate 'A Devil of a time'	

Wednesday, 19 March 2025

6:00 am	Morning revitaliser Join fellow delegates and kickstart your day with a sunrise saunter (walk), morning dash (run) or mind, body and soul session (gentle movement, breathwork and mindfulness).	
7.30 am	Breakfast and Beyond the headlines: A deep dive into markets and economics , Daniel Stojanovski, Centrepont Alliance As we navigate the complexities of 2025, global markets continue to evolve in response to economic, geopolitical, and technological shifts. This conference will provide a comprehensive update on key macroeconomic trends, market performance, and emerging opportunities across sectors. This will all tie into how we are looking at portfolios and why it is most important now than ever to focus on process. Attendees will gain insights into potential risks, investment strategies, and portfolio construction directions taken by the iQ Portfolio Investment team.	Tasman Room
	Bacon, eggs and tech: Flipping frustrations to sunny-side up solutions (Support Staff) , Henry Cai, Matt Nolan & Nicole Alexander, Centrepont Alliance Breakfast peer group discussion facilitated for support staff to discuss day to day roadblocks and share knowledge, ideas and tech solutions.	Boardwalk Gallery
8.30 am	Technology and Transformation Adviser Panel , Anne-Maree Humphries (Huon Financial Planning), Todd Dalton (Turning Point Financial Services), Paul Ter Bogt (Segment Wealth) facilitated by Regional Managers Dave Reynolds and Simon Ponti. Technology offers a multitude of opportunities, from streamlining practice management and enhancing client engagement to enabling personalized education and marketing. In part one, we'll have a 'show and tell' session where our panel of advisers will demonstrate how they are using technology tools in real-world scenarios. We'll share practical tips, tricks, and valuable insights on leveraging technology to drive growth and efficiency in your practice. In part two, we'll open the discussion to all delegates, allowing everyone to share their experiences and insights on adopting new technology in their businesses. You might have some success stories to share, as well as a few lessons learned from not so successful attempts.	Tasman Room
9.30 am	Making Space for True Productivity in the Digital Age , Daniel Sih, Spacemakers Are you overwhelmed and distracted, working harder to keep up with more tasks than time allows? What if the secret of true productivity could be found in making space for less, not more? In this keynote, you'll be inspired to redefine your interaction with time and technology to prioritise what genuinely matters. Explore the critical link between technology, AI, and productivity, and contemplate the significance of carving out time for deep rest, deep thought, and deep focus. You'll be encouraged to adopt actionable strategies to 'keep pace' and 'make space'—mastering the art of disconnecting to focus on what's really important.	Tasman Room
10.30 am	Morning tea	Exhibition Foyer

Wednesday, 19 March 2025

11.00 am	1	<p>Re-thinking active: Active satellites in a changing landscape, Luke Cheetham, PM Capital</p> <p>Investment conditions have changed – now, more than ever, is the time to re-think active investing. This session will highlight the need for a fresh approach to investment conversations, portfolio construction and management in light of rapidly changing market conditions. The session will tackle some of the misconceptions around active investing by providing a fresh look on adopting a blended strategy of active and passive investing. Now is the time for a more discerning investment approach to ensure long-term success for clients.</p>	Wellington Room 1
	2	<p>Candid conversations about breaches (Self Licenced), Nicole Alexander, Centrepont Alliance</p> <p>ASIC continues to express concerns about the lack of breach reporting by licensees and the shortcomings in identifying and managing breaches. In this session, we will explain how we identify, assess and report incidents and breaches. We will share insights into real breaches to assist licensees in understanding and complying with the Reportable Situation regime.</p>	Drysdale Room
	3	<p>Improving decision making by slowing down our thinking, Daniel Moore, Natixis</p> <p>Our brains are an incredibly complex organ, they process significant amounts of information in our daily life's and most of the time are highly efficient and effective. However, when faced with more complex problems our brain's 'wiring' doesn't always lead to effective decision making.</p>	Plenary Hall
	4	<p>Intergenerational wealth transfers, Benjamin Martin, AIA</p> <p>In this technical strategy/practice management session, we take financial advisers through the 'must-know' high net worth (HNW) intergenerational wealth transfer planning opportunities, with a focus on superannuation and property. This information can then be applied in practice to ensure robust discussions are taking place with both estate planning referral partners and indeed the next generation of family members that are in line to inherit the wealth and ultimately evolve into future clients of the practice accordingly.</p>	Tasman Room
11.45 am	Transition		
11.50 am	1	<p>Change. The way you should invest. AI what's next, Alex Pollak, Loftus Peak</p> <p>This piece explores the transformative power of disruptive technologies, with a particular focus on AI, and its impact on industries and consumer behaviour. It delves into AI's evolving role, highlighting its dual function as both an investment opportunity and a strategic tool for refining data-driven decision-making and uncovering emerging trends. Through case studies, it examines how disruptive innovations reshape economic landscapes, unlocking new value in global markets. The article also showcases Loftus Peak's unique approach to identifying long-term growth opportunities in these technologies. It concludes with a forward-looking perspective on the influence of AI and disruption on the future of wealth creation across generations.</p>	Wellington Room 1

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	2	'Hot off the press' - Australia's reporting season highlights and headwinds , Christian Guerra, First Sentier	Wellington Room 2
	3	Corporate Australia tempered its growth promises heading into 2025. But we see encouraging resilience in the underlying economy, with some companies laying the foundation for a strong decade ahead by delivering productivity gains for their customers. As interest rates stabilise, we expect the markets' focus to return to the fundamentals. The \$2.1bn opportunity for financial advice , Kerry Ong, IRESS Together with Deloitte, Iress has launched Advice 2030: The Big Shift, landmark research that uncovers seven societal megatrends that are set to usher in a potential \$2.1bn in new revenue and nearly half a million new clients for the financial advice industry by 2030. These megatrends will radically reshape how we plan for the future. Join Kerry Ong, General Manager - Customer at Iress, as he unpacks how the advice industry can meet this huge influx in demand, the opportunities that will influence customer expectations and advice business models in the next five years, and the four key choices advisers will need to make in order to thrive and prosper. Kerry will also share how these megatrends will shape the Xplan product roadmap. The big shift is here, and it's time to rethink the kind of advice this world needs.	Tasman Room
	4	Separately Managed Accounts (SMAs) panel session , Bronte George, Macquarie Asset Management and Daniel Stojanovski, Ventura Funds Management facilitated by Colette Thunig, Centrepont Alliance Discover how SMAs can enhance investment strategies, optimise efficiency, and provide tailored solutions for investors. Our expert panellists will delve into the advantages of SMAs in today's dynamic financial landscape, offering valuable insight and practical guidance for financial professionals. Don't miss this opportunity to gain a deeper understanding of SMAs and their potential to elevate your investment approach.	Plenary Hall
	5	Candid conversations about complaints (Self Licenced) , Nicole Alexander, Centrepont Alliance ASIC has flagged potential shortcomings in the internal dispute resolution processes and/or IDR reporting of financial firms. In this session, we will examine prevalent and current complaints and offer practical strategies to improve licensees' complaint management skills. We will review recent complaints and share our insights into effective complaint handling.	Drysdale Room
12.35 pm		Lunch	Exhibition Foyer
		Lunch Bytes 12.50 pm - 1.05 pm - SuperConcepts	Wellington Room 1
		1.05 pm - 1.20 pm - Enzumo	Wellington Room 2
1:45 pm		On the couch with the executive panel , John Shuttleworth, Paul Cullen, Tanya Seale, Patrick Jackson, Tara Foulkes, Brendon Glass, Francis Rigby Centrepont executives deliver business updates and respond to your questions.	Tasman Room

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	Reading your clients and increasing profits, Steve van Aperen	
2:30 pm	How effective are you at reading your clients? Do you think your clients are withholding information during the interview process? What are the most effective ways to read and understand your clients and build profits. Steve van Aperen who is a behavioural analyst will show the key areas to look at in any face-to-face communication with a client. Steve's insightful tips will not only help you build a rapport with clients but increase profits in the process.	Tasman Room
3:30 pm	Summary and close	Tasman Room
3:30 pm	Delegate idea sharing zone	Boardwalk Gallery
	Corporate partners thank you cocktail hour	Green Room Bar
	Free evening	

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6:00 am	Morning revitaliser Join fellow delegates and kickstart your day with a sunrise saunter (walk), morning dash (run) or mind, body and soul session (gentle movement, breathwork and mindfulness).	
From 6.30 am	Breakfast	Boardwalk Bistro
8.15 am	MC opening	Tasman Room
8.30 am	Maximise the value of your business and ensure it is exitable , Craig West, Succession+ This workshop session will engage support staff, advisers, practice managers and principals exploring: <ul style="list-style-type: none"> • Talent acquisition and retention • Business Metrics and valuation • Equity Strategies - ESOP • Continuity Planning • M&A • Succession Planning 	Tasman Room
10.00 am	Morning tea	Exhibition Foyer
10.30 am	Disruptopia: From Rustbelt America to the Cutting Edge of AI , Stephen Scheeler, Omniscent Stephen Scheeler is the former Facebook CEO for ANZ, and today CEO of revolutionary AI startup, Omniscent AI. In this insightful keynote, Stephen shares his personal journey from rustbelt America to Silicon Valley and the cutting edge of AI. He highlights how AI is enabling what was once thought impossible, while at the same time making people more important than ever in building successful businesses. With insight, humility and humour, Stephen shines a light on the intersection of AI and humanity and what business leaders (and other humans) of all shapes and sizes need to do to survive and thrive in the 21st century.	Tasman Room
11.30 am	The FSCP and you: What every adviser should know , Tara Foulkes and Nicole Alexander, Centrepoint Alliance This session will examine the role of the Financial Services and Credit Panel (FSCP) and its impact on financial advisers. Since its establishment in 2023, the FSCP has actively exercised its powers to address suspected misconduct within the industry. We will discuss the types of misconduct that attract regulatory scrutiny, review key decisions made by the FSCP, and analyse the outcomes and penalties imposed. Additionally, we will explore the costs and broader consequences that may result from such decisions and provide valuable insights and practical advice on how to navigate this new regulatory landscape effectively.	Tasman Room
12.30 pm	Lunch	Exhibition Foyer
	Lunch Bytes 12.45 pm - 1.00 pm - MyProsperity	Wellington Room 1
	1.00 pm - 1.15 pm - PSC Insurance	Wellington Room 2

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1.30 pm		Talking Technical: Key changes you need to know for 2025 , Melinda Bendeich, Centrepont Alliance	Tasman Room
		In this presentation, we provide a comprehensive understanding of the latest developments in legacy pension rules, aged care reforms from 1 July 2025, and the financial uncertainties leading up to the end of the financial year, particularly with a Federal election on the horizon. We will explore the opportunities and challenges these changes present including practical case studies to ensure you are well-informed and prepared for 2025.	
2.30 pm		Transition	
	1	Is it different this time? , Slava Platkov, Dimensional In the investment industry, jargon often reigns supreme, creating barriers between advisers and their clients. Terms like Expected Return, Priced In, Diversifiers, Income and New Normal can leave clients feeling confused and disengaged. Join Dimensional Portfolio Manager as we breath some fresh air into these common investment jargon terms as we will help break down each term into clear, relatable language, empowering advisers to communicate these concepts effectively with clients.	Wellington Room 1
	2	The future of risk advice v2 , David Glen, TAL What does the future of risk advice look like? There has been a perfect storm of regulatory change, new professional standards, updated superannuation legislation, claims sustainability pressures and a shift in consumer expectations. It is also likely we will see more change following the release of the Quality of Advice Review. How can the risk advice practice of the future meet the challenges of change and continue to help their clients profitably. The risk practice of the future will start to charge advice fees, but not in the traditional sense. A shift in thinking is needed about how the value of risk advice is considered. We believe that shifting the focus of advice from the financial product to the potential claim's outcome, can assist advisers in demonstrating the value of the advice they provide. This session will look to the future with a view to help retain and grow practice revenue in the risk space.	Wellington Room 2
2.35 pm	3	6 lessons and a blessing , Peter Gunning, Russell Investments Discover the art and science of investment leadership as Pete shares what it takes to build and maintain a world-class investment engine that can deliver exceptional results for the world's most demanding investors. Pete's extensive expertise comes to life through a collection of anecdotes, illuminating his observations and interactions amidst some of the most euphoric - and devastating - market extremes on record.	Boardwalk Gallery
	4	Reframe retirement for your clients , Kylee Shepherd, BlackRock Retirement should begin with wellbeing, yet there is a gap in how the financial industry has historically approached it. It seems there is an opportunity to help redesign and support the current advisory offering for clients while adding a new lens. Differentiate your value proposition and build deeper relationships with clients and attracting new clients by helping them more proactively design their futures.	Plenary Hall

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3.20 pm	Afternoon tea	Exhibition Foyer
3.40 pm	Triumph over tragedy , Curtis McGarth OAM, Paralympian My story will take you on a journey, from the dust and dangers of Afghanistan to the most elite stage of sport the Paralympic Games. My story is one of true grit and determination by using goals, discipline and teamwork in order to achieve Gold medals at the Paralympic Games.	Plenary Hall
4.40 pm	Summary and close , John Shuttleworth	Plenary Hall
5.00 pm	Group photo	
6.45 pm	Gala dinner 'Roaring '20s / Gatsby'	Tasman Room
11.00 pm	Afterparty	Birdcage Bar

Friday, 21 March 2025

From 6.30 am	Breakfast	Boardwalk Bistro
11.00 am	Hotel check-out delegates depart	