DRAFT PROGRAM

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Session Description	Speakers / Panellists
9:00 – 9:10 AM 10 mins — **Conference Opening**	
Welcome and opening remarks from FSC CEO Blake Briggs.	**Blake Briggs**, CEO, FSC

9:10 – 9:25 AM 15 mins — **KEYNOTE | The State of Advice: Demand, Capacity and Growth**	
Research keynote presenting the latest data on advice demand, capacity constraints and the growth outlook for Australia's advice profession.	**Andrew Inwood**, CEO, CoreData ✓ Confirmed

9:25 – 10:00 AM 35 mins — **The Structural Shift: Why Investors Are Backing the Future of Advice**	
Capital is flowing into Australian advice businesses at a scale not seen for years. While public debate focuses on regulatory complexity and adviser shortages, sophisticated investors are making a different calculation — seeing strong long-term fundamentals, recurring revenue models and significant growth opportunities. This session explores why advice has become one of the most attractive areas of financial services investment, what investors are seeing in the market, and how businesses are evolving to capture the next phase of growth. Panellists will discuss the rise of strategic capital, succession and acquisition activity, the evolving economics of advice businesses, and what increased investment means for advisers, clients and the future of the profession in addressing Australia's advice gap.	**Darren Steinhardt**, CEO, infocus ✓ Confirmed **Paul Barratt**, Group CEO, AZ NGA ✓ Confirmed **Andrew Inwood**, CEO, CoreData ✓ Confirmed Chair: **Melinda Howes**, Group Executive, Superannuation & Investments, AMP ✓ Confirmed

10:00 – 10:30 AM 30 mins — **Fireside Chat | Tim Wilson, Shadow Treasurer**	
The Shadow Treasurer Tim Wilson will share the Opposition's perspective on the future of Australia's financial services sector and its role in supporting economic growth. This keynote followed by a fireside discussion will explore the Coalition's approach to economic growth and productivity, fiscal responsibility, tax reform, as well as the importance of a strong financial services industry in enhancing the nation's productive capacity and long-term prosperity.	**Tim Wilson**, Shadow Treasurer ✓ Confirmed Chair: **Blake Briggs**, CEO, FSC ✓ Confirmed

MORNING TEA | 10:30 – 10:55 AM

11:00 – 11:40 AM 40 mins	**Australia's Advice Gap: The Unmet Need**
Australia is confronting a growing advice gap. More than 2.5 million Australians are expected to retire in the next decade, driving demand for financial guidance at a time when adviser numbers remain constrained. CoreData predicts that approximately 1.7 million Australians who want advice will be unable to access it. This session will examine the implications for advisers, superannuation funds and policymakers, and explore how the sector can expand access while maintaining quality and consumer protections. What role might targeted advice, new adviser pathways, digital solutions and emerging technologies such as AI play in supporting advisers, improving consumer engagement and creating a more scalable and sustainable retirement advice ecosystem alongside regulatory reform?	**Matt Brown**, CEO, Fortnum and Personal Financial Services ✓ Confirmed **Andrew Gregory**, Chief Advice Officer, UniSuper ✓ Confirmed **Adrian Gervasoni**, Executive Manager Advice Services, Industry Fund Services ✓ Confirmed **Jason Huong**, CEO, InvestStream ✓ Confirmed Chair: **Chris Weldon,** Chief Transformation Officer, MUFG Pension & Market Services ✓ Confirmed

11:40 – 12:20 PM 40 mins	**Navigating the New Tax Landscape: Implications of Federal Budget Changes**
The 2026–27 Federal Budget proposes some of the most significant changes to Australia's investment tax settings in decades, including reforms to capital gains tax concessions and negative gearing. This session will explore how the reforms could reshape investor behaviour, portfolio construction and retirement planning. What do the changes mean for advice conversations, investment recommendations and platform operations? How can advisers and platforms support clients through the transition, and what opportunities and risks should the industry prepare for as the new framework takes effect? Join industry leaders to examine the practical implications of Australia's evolving tax landscape.	**Bryan Ashenden**, Head of Financial Literacy & Advocacy, BT Financial ✓ Confirmed **Daniel Shrimski**, CEO, Vanguard Super ✓ Confirmed **Geoff Wilson**, Chairman and CIO, Wilson Asset Management ✓ Confirmed Chair: **Keith Cullen**, CEO, WT Financial ✓ Confirmed

12:20 AM – 12:50 PM 30 mins	**Fireside Chat | ASIC: Alan Kirkland**
A Fireside Chat with ASIC Chair Alan Kirkland, exploring the regulator's priorities, approach to consumer protection, and outlook for the advice sector.	**Alan Kirkland**, Chair, ASIC ✓ Confirmed Interviewer: **Blake Briggs**, CEO, FSC ✓ Confirmed

🍽 LUNCH | 12:50 – 1:40 PM

1:40 – 1:50 PM 10 mins	NMG Research | The Impact of Superannuation Choice on Retirement Outcomes
A data-led presentation examining how superannuation choice affects retirement outcomes across different member cohorts.	**Lachlan Reardon**, Partner, NMG Consulting ✓ Confirmed

1:50 – 2:30 PM 40 mins	Targeted Reform, Better Outcomes: An Industry-Led Response
In the wake of the Shield and First Guardian collapses, the sector faces a new wave of regulatory change to strengthen consumer protections. This session examines how industry can lead a balanced response by addressing the core issues behind the failures while avoiding regulatory overreach that could undermine choice, competition and access to affordable advice. Blake Briggs will open with key insights from the FSC White Paper on Advice Licensing before the panel explores reforms to consumer protections, platform governance, the CSLF and DBFO, and how targeted reform can deliver better outcomes for consumers without unnecessary cost and red tape.	**Neil Younger**, CEO, Entireti ✓ Confirmed **Kate Farrar**, CEO, Brighter ✓ Confirmed Andrew Alcock, CEO, Hub24 (invited 19/06) **Lachlan Reardon**, Partner, NMG Consulting✓ Confirmed Chair: **Chaneg Torres, Executive Director, Policy, FSC**✓ Confirmed

2:30 – 3:10 PM 40 mins	Platforms, Providers and the Value Chain: The Evolving Role of Platforms
As Australia grapples with the challenge of delivering affordable, accessible financial advice at scale, platforms are evolving beyond investment administration to become critical enablers of the advice process. Through investment in technology, workflow automation, AI, data connectivity and practice support, platforms are helping advisers improve productivity and reduce the cost of delivering advice. As their role expands, where should the line be drawn between platforms, advice practices and advisers? How can technology enhance efficiency without compromising professional judgement or client relationships? Join industry leaders as they explore the future role of platforms in building a scalable, sustainable advice ecosystem.	**Renee Howie**, Chief Customer Officer, Insignia ✓ Confirmed **Darren Pettiona**, Executive Director Strategy, Dash ✓ Confirmed **Matt Heine**, CEO & MD, Netwealth ✓ Confirmed Chair: **Blake Briggs**, CEO, FSC ✓ Confirmed

AFTERNOON TEA | 3:10 – 3:30 PM

3:30– 4:00 PM 30 mins	Building Trust in an AI World: Four Crucial Lessons from Industries Leading Technological Change
Artificial intelligence is transforming how organisations engage with customers, deliver services and make decisions. Yet the greatest challenge is not adopting AI, but maintaining trust. As advice businesses seek to improve productivity, expand access and deliver more personalised experiences, success will depend on consumer confidence. What can financial advice learn from industries already leading this transformation? Drawing on examples from retail, healthcare, automotive and logistics, Nigel Dalton and Manu Iyer from Thoughtworks will share four practical lessons for building trust while harnessing AI to strengthen client confidence, business performance and sustainable growth.	**Nigel Dalton**, Technology Advisor & Evangelist, Thoughtworks ✓ Confirmed **Manu Iyer**, Director & Industry Head, BFSI APAC, Thoughtworks ✓ Confirmed Chair: **Sam Wall**, CEO, Wealth, Iress ✓ Confirmed

4:00 – 4:45 PM 45 mins	Managed Accounts: Growth, Governance and Regulatory Expectations
Managed accounts have become one of the fastest growing segments of Australia's advice market, with advisers, platforms and investment managers increasingly adopting SMAs and MDAs to deliver scalable investment solutions and consistent client outcomes. As the sector approaches $300 billion, ASIC has intensified its focus on governance, conflicts management and consumer outcomes. This session explores the drivers of continued growth, the opportunities and risks facing the sector, and what advisers, licensees, platforms and investment managers should be doing now to meet heightened regulatory expectations while continuing to deliver value for clients.	**Grant Hackett**, Group CEO, Generation Development Group ✓ Confirmed **Kristine Goodwin**, Director Growth & Wealth Distribution, AMP ✓ Confirmed **Matt Lawler**, CEO, Akumin ✓ Confirmed Chair: **Sarah Brennan**, Advisory Board, Investment Trends ✓ Confirmed

4:45 – 4:55 PM 10 mins	Final Session — Event Close
Closing session — topic and format to be confirmed.	Speakers: Blake Briggs, CEO, FSC

🥂 NETWORKING DRINKS | 5:00 PM ONWARDS

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