



The Summit 2018 Program

Day One: Wednesday 25 July 2018

TIME	TOPIC	SPEAKERS
8:00am-9:00am ARRIVAL COFFEE & TEA		
9:00am-9:10am	PLENARY The Summit Opening	<ul style="list-style-type: none"> Toby Taverner, Master of Ceremonies
9:10am-9:20am	PLENARY Platinum Sponsor Opening Remarks	<ul style="list-style-type: none"> Anthony James, Leader – Asset & Wealth Management, PwC
9:25am-9:30am	PLENARY Deputy Chairman Opening Remarks	<ul style="list-style-type: none"> Brad Cooper, CEO, BT Financial Group
9:35am-10:35am	<p>PLENARY Global and Regulatory Trends – What’s happening in the rest of the world?</p> <p>What global and regulatory trends are happening around the world with respect to financial services and how they are being affected by it, how other jurisdictions compare with Australia and what should we expect as we become a more cohesive region.</p>	<ul style="list-style-type: none"> Chair: Greg Cooper, CEO, Schroder Investment Management Takumi Shibata, President & CEO, Nikko Asset Management Japan Shane Oliver, Head of Investment Strategy & Chief Economist, AMP Capital Carol Geremia, President, MFS Investment Management US Peter Kim, Managing Director, MiraeAsset Daewoo, Korea
10:35am-11:00am MORNING TEA		
11:00am-11:50am	<p>LIFE: InsurTech</p> <p>A look at the latest global technological innovations in Life Insurance, such as P2P micro-insurance or selfie insurance, and where might the opportunities be for Australia.</p>	<ul style="list-style-type: none"> Chair: Tim Bailey, CEO, Zurich Australia Scott Fergusson, Leader – Insurance, PwC Josh Wilson, CEO, Grow Super Laura Kalomiris, Director of Operations, Trōv Simon O’Dell, CEO & Co-founder, Insurtech Australia
11:00am-11:50am	<p>ADVICE: Financial Advice and the way forward</p> <p>There is a growing need for advice as household debt grows and super becomes more complex. How can the industry make the fundamental changes necessary to win back consumer trust, rebuild its reputation and become a customer-centric profession?</p>	<ul style="list-style-type: none"> Chair: Colin Tate, CEO, Conexus Financial Michael Wright, General Manager, BT Financial Group Claire Mackay, Principal, Quantum Financial tbc



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11:00am-11:50am	<p>INVESTMENT: Trade, Asia and the Passport</p> <p>The expert panellists will also consider the impact of the Asia Region Funds Passport and how significant this may become as it grows. What impacts will the relaxing of regulations in China have for foreign investment?</p>	<ul style="list-style-type: none"> • <i>Chair: Sara Dix, Senior Policy Manager, Financial Services Council</i> • Nikki Bentley, Partner, Norton Rose Fulbright • Gerard Fitzpatrick, Senior Executive Leader – Investment Managers and Superannuation, ASIC • Amna Khan, Head of Product – APAC and Americas, Colonial First State Global Asset Management • Mark Burgess, Non-Executive Chairman, Yarra Capital Management
11:00am-11:50am	<p>LEGAL: AFCA Update</p> <p>An update on the Australian Financial Complaints Authority (AFCA), which is an amalgamation of the Financial Ombudsman Service [FOS], the Superannuation Complaints Tribunal [SCT] and the Credit & Investments Ombudsman.</p>	<ul style="list-style-type: none"> • <i>Chair: Julie Coates, Managing Partner - Clients and Industries, PwC</i> • Helen Coonan, Chairman, AFCA • Alexandra Kelly, Principal Solicitor, Financial Rights Legal Centre • <i>Tbc</i>
11:55am-12:35pm	<p>PLENARY Political Perspective</p>	
<p>12:35pm-1:20pm LUNCH</p>		
1:20pm-2:10pm	<p>SUPER: Productivity Commission Inquiry</p> <p>Unpacking the super and life insurance recommendations.</p>	<ul style="list-style-type: none"> • <i>Chair: David Knox, Senior Partner, Mercer</i> • Karen Chester, Deputy Chair, Productivity Commission • David Bryant, CEO, Australian Unity Wealth • Jeremy Houghton, Head of Strategy & Corporate Affairs, AIA • <i>Tbc</i>
1:20pm-2:10pm	<p>ADVICE: Robo-Advice</p> <p>One of the main reasons people cite for not seeing a financial adviser is cost. With the advent of Robo-Advice, the cost of seeing an adviser will decrease. We look at what the future of financial advice may look like if the industry embraces new technologies.</p>	<ul style="list-style-type: none"> • <i>Chair: Matt Kuperholz, Chief Data Scientist, PwC</i> • Kim Hughes, Chief of Member Support & Advice, QSuper • John Price, Commissioner, ASIC • Hugh Morrow, CEO & Co-Founder, SuperEd • Nerida Cole, Managing Director, Head of Advice, Dixon Advisory

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1:20pm-2:10pm	INVESTMENTS: ESG - Not just equities.	<ul style="list-style-type: none"> • Adam Kirkman, Head of ESG, AMP Capital Investors
	How to incorporate ESG to real asset classes. How is Australia faring globally?	<ul style="list-style-type: none"> • Rachel Farrell, CEO & Country Head, JP Morgan Asset Management Australia
		<ul style="list-style-type: none"> • Matthew McAdam, Head of Australasia, UNPRI • Marian Poirier, Senior Managing Director, Head of Australia, MFS Investment Management Australia
1:20pm-2:10pm	LEGAL: RG97 - updates	
		<ul style="list-style-type: none"> • Chair: Keren Miller, Senior Legal Counsel, Pental Group • Jon Ireland, Partner, Norton Rose Fulbright • Mike McCorry, Chief Investment Officer, BlackRock • Darren McShane, Special Investigator, ASIC • Ian Fryer, Head of Research, Chant West
2:15pm-3:15pm	PLENARY Disintermediation: who are the new giants?	<ul style="list-style-type: none"> • David Neal, CEO, The Future Fund
	The sale of many wealth management businesses by a number of banks is creating big shifts in the market.	<ul style="list-style-type: none"> • Scott Hartley, CEO, SunSuper
		<ul style="list-style-type: none"> • Helen Rowell, Deputy Chairman, APRA • Andrew Walker, COO, BT Financial Group • Chris Kelaher, Managing Director, IOOF
3:15pm-3:40pm	AFTERNOON TEA	
3:40pm-4:25pm	PLENARY Disrupters: Leading in Innovation	<ul style="list-style-type: none"> • Chair: Monty Hamilton, Partner – Digital Transformation, PwC
	Who's doing it and doing it well?	<ul style="list-style-type: none"> • Eric Wilson, Founder and CEO, Xinja
		<ul style="list-style-type: none"> • Chris Powell, Managing Director, Integrity Life • Michael Heine, Joint Managing Director, Netwealth Investments Limited • tbc
4:30pm-5:20pm	PLENARY The Royal Commission	<ul style="list-style-type: none"> • Chair: Sally Loane, CEO, Financial Services Council
	This will examine the power of Royal Commissions and their legacies; analysis of the Royal Commission process and its effect on public sentiment, markets and corporate culture.	<ul style="list-style-type: none"> • The Hon Neville Owen QC, HIH Royal Commission
5:00pm	End of day - See you at dinner!	

Day Two: Thursday, 26 July 2018

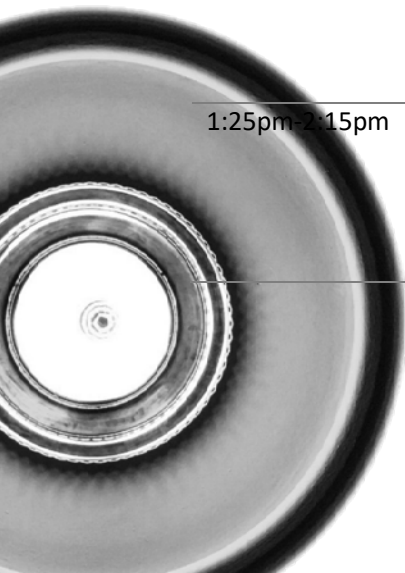
TIME	TOPIC	SPEAKERS
8:30am-9:25am		
ARRIVAL COFFEE & TEA		
9:30am - 10:10am	PLENARY ASIC Address	<ul style="list-style-type: none"> James Shipton, Chairman, ASIC
10:15am - 10:35am	PLENARY Political Perspective from Government	<ul style="list-style-type: none"> The Hon Kelly O'Dwyer MP, Minister for Revenue and Financial Services
10:35am-11:05am		
MORNING TEA		
11:05am-11:55am	LIFE: Group insurance Political and regulatory landscape. What does the environment look like? What are the new opportunities in Group Insurance?	<ul style="list-style-type: none"> Chair: David Hackett, CEO & Executive Director, MLC Life Insurance Brett Clark, CEO, TAL Adrian Rees, General Manager, APRA <i>Tbc</i> <i>Tbc</i>
11:05am-11:55am	ADVICE: FASEA update An update from FASEA and what this means for advisers?	<ul style="list-style-type: none"> Chair: Dante De Gori, CEO, Financial Planning Association of Australia Dr Deen Sanders, Former CEO, FASEA Jason Andriessen, Managing Director, CoreData Group Tanya Seale, Head of Advice, ClearView Dr Adrian Raftery, Associate Professor, Deakin University
11:05am-11:55am	INVESTMENT: Corporate Collective Investment Vehicle (CCIV) What to expect from the new CCIV regime - the benefits and the challenges. The CCIV is intended to provide a more flexible option than the existing trust-based managed investment funds for Australian and foreign investors and is based on models from the UK and Luxembourg.	<ul style="list-style-type: none"> Chair: Carla Hoorweg, National Manager Government & Industry Relations, Challenger Limited Andrew Clements, Partner, King & Wood Mallesons Ken Woo, Partner, PwC Andrew Cannane, Institutional Funds Executive, Evans Dixon Suzu Superina, Senior Manager, Perpetual Corporate Trust



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11:05am-11:55am	DEBATE: Millennials vs The Rest Trust and Technology.	<ul style="list-style-type: none"> • Chair: Claire Hooper, Host, The Pineapple Project Podcast • Brett Jollie, Managing Director Australia, Aberdeen Asset Management • Simon Swanson, Managing Director, ClearView • Vinod Kumar, Vice President Legal & Compliance, BlackRock Investment Management • <i>TBC</i>
12:00pm-12:30pm	FSC CEO Address	<ul style="list-style-type: none"> • Sally Loane, CEO, Financial Services Council
12:30pm-1:20pm		LUNCH
1:25pm-2:15pm	SUPER: Retirement Incomes What's next?	<ul style="list-style-type: none"> • Chair: Matthew Lawrance, CEO, MLC Super • Bryce Doherty, CEO, UB Asset Management Australia • Jeremy Cooper, Chairman – Retirement Income, Challenger Limited • Ruth Stringer, Partner, King & Wood Mallesons • Robert Jeremenko, Division Head – Retirement Income Policy Division, Treasury
1:25pm-2:15pm	TECH: Technology, Regulation and Competitive Advantages What is stopping Australia from being in the race?	<ul style="list-style-type: none"> • Chair: Marian Azer, Managing Director, RBC I&TS • Mark Adams, Executive General Manager, APRA • Toby Heap, Founding Partner, H2 Ventures • Simun Soljo, Managing Associate, Allens • Lisa Schutz, Director, RegTech Association
1:25pm-2:15pm	INVESTMENT: Impact Investing Debt and Green Bonds – It's not just about doing good. The panel will explore what is needed for investors to be involved in the projects and any barriers remaining. What does success look?	<ul style="list-style-type: none"> • Chair: Michael Trill, Director, MH Carnegie & Co • Richard Brandweiner, CEO, Pendal Group • Phil Vernon, Managing Director, Australian Ethical • Rosemary Addis, Executive Director & Chair, Impact Investing Australia



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1:25pm-2:15pm	<p>INVESTMENT: Future of Wealth Management In an environment where levels of regulatory change and uncertainty are only increasing, how will funds management and superannuation change over coming decades? Some of the leading experts on wealth management and super in Australia will give their unique insights into this and other questions in this session.</p>	<ul style="list-style-type: none"> • <i>Chair: Mark Pankhurst, Head of Superannuation, ANZ Wealth</i> • Anthony James, Leader – Asset & Wealth Management, PwC • Michael Rice, CEO, Rice Warner • Robin Bowerman, Head of Market Strategy and Communications, Vanguard Investments Australia • <i>tbc</i>
2:25pm-3:10pm	<p>PLENARY Royal Commission This session will examine the power of Royal Commissions and their legacies. The panel will discuss their analysis of the Royal Commission process and its effect on public sentiment, markets and corporate culture.</p>	<ul style="list-style-type: none"> • <i>Chair: Sally Loane, CEO, Financial Services Council</i> • Andrew Main, Journalist • Scarlet Reid, Partner, McCullough Robertson • Graeme Samuel AC, Professional Fellow, Monash University
AFTERNOON TEA		
3:15pm-3:35pm		
3:40pm-4:30pm	<p>PLENARY How to Successfully Rebuild Trust</p>	<ul style="list-style-type: none"> • <i>Chair: Sally Loane, CEO, Financial Services Council</i> • Russel Howcroft, Chief Creative Officer, PwC • Dr Simon Longstaff, Executive Director, The Ethics Centre • Brad Cooper, CEO, BT Financial Group • Ming Long, Independent Chairman, AMP Capital
CONFERENCE CLOSE		
4:35pm-4:45pm		



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