

3:35 pm - 4:20 pm

Breakout Session 1

Stream A **Two to Tango: Optimising retirement outcomes for couples**

Jenneke Mills, Head of Technical Services



When it comes to retirement planning, two isn't just company - it's complexity. From contribution caps and transfer balance limits to the interplay of superannuation, tax, social security and estate planning, the optimal strategy for a couple is rarely a one size fits all solution. Overlay that with current cost of living pressures and some of the ways that families are looking to support each other to navigate difficult times; and planning today without a long-term lens could be a disaster. Advisers must navigate a maze of current rules while also considering future possibilities and whether modifications are needed before implementing recommendations today. In this interactive session, Jenneke Mills will unpack the key rules, opportunities and real world planning considerations for couples at all life stages. Whether your clients are married, de facto, blended or just financially intertwined, this session will arm you with the insights to help both partners retire with clarity and confidence.

Stream B **Investing when uncertainty feels more ... uncertain**

Ritesh Prasad, Multi Sector Portfolio Manager



For four decades, investors benefited from a remarkably favourable environment: ever-declining interest rates, low and stable inflation, benign geopolitics, and the dual tailwinds of globalisation and technological progress. But that era came to an abrupt end with the onset of COVID-19. Within weeks, governments unleashed fiscal stimulus on a scale not seen in modern history. This surge, combined with Europe's largest conflict in 80 years, unleashed inflationary pressures that prompted the unwinding of over a decade of monetary accommodation - all within just 12 months. Even as inflation showed signs of easing, a dramatic shift in global economic policy followed with Donald Trump's return to the White House, reviving protectionist tariffs and challenging decades of trade orthodoxy. His inflation-inducing stance further disrupted the global investment landscape. In this new reality, traditional economic models and portfolio construction strategies have been called into question. In 2022, equities and bonds sold off in tandem. Even so-called "safe havens" like US Treasuries and the dollar became sources of volatility rather than stability. With foundational labels such as risk-free, defensive, and balanced under scrutiny, financial advisers must now think more deeply about how to build truly resilient portfolios.

4:30 pm - 5:15 pm

Breakout Session 2

Stream A **Leadership beyond technical: Soft skills for big impact**

Mark Kennedy, National Account Manager and Stuart Matheson, Platforms BDM



Soft skills are a key ingredient to stronger leadership, cohesive teams and lasting client relationships. With the changing demographics and diversity amongst clients and teams there is increased importance for leaders to focus on soft skills. In this interactive session you will workshop practical ideas to strengthen skills and take away an actionable plan to drive meaningful professional growth.

As a result of this session advisers will:

1. Develop their interpersonal skills by recognising their strengths and weaknesses within soft skills, focusing on self awareness, adaptability, communication, empathy and emotional intelligence.
2. Through audience workshops, problem solve and strategise when these soft skills present in clients and how to adapt to benefit the client.
3. Strengthen leadership and mentoring skills with their staff via group discussion and share ideas on what they can implement to create more dynamic teams to better serve their clients.

Stream B **Retirement Advice: 2025 observations and navigating future change**

Andrew Lowe, Head of Technical Services



In 2025 retirement and retirement advice has come into full view. Super funds are building and delivering lifetime pensions to complement their account-based pensions. At the same time, super funds are actively building pathways for directing members into their pensions both with, and without, comprehensive personal advice as we know it. And yet, this is just the start. In this interactive future-focused session we'll examine the prospect of super funds guiding their members to and through retirement with a combination of member direct, guided choice and advice solutions (including digital advice solutions). We'll unpack what super funds are developing on the product front, and how their emerging advice models intersect with yours, and we'll deep dive into adviser, practice, licensee and superfund retirement income philosophies and demonstrate the benefit that such philosophies can bring to both you and your clients.

1:30 pm - 2:15 pm

Breakout Session 3

Stream A **Investment evolution: How to adapt your portfolio for changing economic landscapes**

Nathan Lim, Chief Strategy Officer

Lonsec

Lonsec Investment Solutions' outlook for growth and inflation are informed by the 5 Ds: Demographics, Debt, Disruption, Decarbonisation and Deglobalisation. These are the five key structural drivers we see impacting the global economy over the next decade and beyond. An aging population, highly indebted governments, rapidly evolving technology, the energy transition and deglobalisation remain squarely in the headlines as the Trump Administration continues to dynamically impact all these trends in new and surprising ways. Hear from Nathan Lim, LIS' Chief Investment Officer who will use their 5D framework to inform portfolio construction choices in this boiling cauldron we call global markets.

Stream B **What makes a good CEO?** James Holt, Head Investment Specialist

Perpetual

Global markets are being buffeted by a powerful confluence of forces - technological disruption, the return of Trump, a more aggressive use of tariffs in global trade, and the accelerating transition to a low-carbon economy. So how should equity investors respond in a world marked by so much change? Our approach is to step back from the noise and focus on what endures. We look to the companies that have stood the test of time - businesses with strong competitive advantages, adaptive cultures and exceptional leadership. These are the long-term winners: firms that have successfully navigated technological revolutions, policy shocks, and economic downturns, delivering sustainable value creation through multiple cycles. In particular, we study the CEOs and management teams who have steered their companies through uncertainty with discipline, vision and an ability to pivot when required. In times of transition, these leaders matter more than ever.

2:20 pm - 3:05 pm

Breakout Session 4

Stream A **TPD today and tomorrow** David Glen, National Technical Manager

TAL

TPD cover has long been a cornerstone of risk protection strategies. However, over time as societal, medical and economic landscapes have evolved, the TPD construct has become misaligned with the core purpose of protection in the event of permanent disability. This has resulted in some adverse customer impacts, including access and affordability of cover as well as reduced predictability in future cost. It has now also been a number of years since the APRA sustainability measures were implemented into Income Protection products, and the advice considerations and strategies using these products for both existing and new clients has evolved. This session will explore these issues, canvas new product designs coming to market and look at the advice considerations for both Income Protection and TPD.

Stream B **Activism: A unique approach to generate alpha**

James Hawkins, Partner and Head of the L1 Capital Catalyst Fund

L1 CAPITAL

Activist investing is not new in a global context, particularly in the United States. But in Australia, it's not an investment style many investors are familiar with. So, what is "activism" as an investment style? What does it mean in Australia and why does it work here? James Hawkins, Partner & Head of the L1 Capital Catalyst Fund, will share his answers to these questions and walk through some real life examples of using activist techniques to unlock shareholder value in Australian companies.

3:35 pm - 4:20 pm

Breakout Session 5

Stream A **Why quality matters in a changing economic landscape**

Elisa Di Marco, Investment Director and Analyst

MAGELLAN
EXPERTS IN GLOBAL INVESTING

Not all quality companies are created equal. Being forward looking in your determination of quality is critical in protecting capital through the cycle. In the presentation, we will answer the question of why quality fundamentals and why having consideration for disruptive megatrends matters when investing in changing economic landscapes. In this session, we will showcase companies from the Technology, Financials and Consumer Staples sectors, highlighting the attractive and sustainable returns they can generate.

Stream B **Sustainable and ethical Investing in super: The rise of ESG funds**

Mans Carlsson, Head of ESG, Co-Portfolio Manager Active Sustainable Equity

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Måns Carlsson (OAM) will lead a discussion focusing on important issues in ESG and Sustainability, mainly the state of ESG in the current environment (USA trends, Australian trends), Climate Change (Risks and opportunities, Net zero commitments) as well as Modern Slavery and Human Rights (Overview, Investor relevance).