

adviser Innovation SUMMIT 2018

AGENDA

Principal Partner



8:00AM REGISTRATION OPENS

8:45AM
INTRODUCTION FROM THE MC
Aleks Vickovich, Managing Editor, Adviser Innovation

8:50AM
INTRODUCTION FROM PRINCIPAL PARTNER
Michael Heine, Joint Managing Director, Netwealth

9:00AM INSIDE THE MIND OF THE NEW FINANCIAL CONSUMER

For financial advisers to continue to add value in the digital age they must keep pace with trends in consumer behaviour and appetite. This session takes a deep dive into the mind of your current and future customer, enabling you to:

- Tune into what your customer expects when it comes to their money
- Identify evolving trends to better engage the customer
- Construct an approach which speaks to their changing needs

Speaker: Adam Ferrier, leading consumer psychologist, brand strategist and behavioural economist

10:00AM REMOVING FRICTION FROM THE ADVICE PROCESS

What do companies like Amazon, Domino's Pizza and Virgin Airlines have in common? What is one of the key reasons for their ongoing success?

Arguably it is their relentless focus on the customer experience. This presentation explores:

- How these and other businesses remove friction from the customer experience
- Areas of the advice process where customer friction could

be eliminated
• Techniques and practices to implement into your advise practice today

"We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little bit better." Jeff Bezos

Speaker: Matt Heine, Joint Managing Director, Netwealth

10:40AM COFFEE BREAK

11:10AM
INNOVATOR & ADVISER Q&A
Speakers: Peter Malekas, Founder and Managing Director, Moneysoft
Adele Martin, Founder, Firefly

11:50AM MAKING COMPLIANCE A COMPETITIVE ADVANTAGE WITH REGTECH

In this session, hear about:

- What innovation is happening in the RegTech space and where it is heading
- How advisers can access easy and effective advice RegTech solutions
- What regulators and licensees are doing on the tech front and how it impacts advisers
- Case studies of businesses already on the front foot and the benefits they are seeing

Speaker: Samantha Clarke, CEO and Co-Founder, Advice RegTech

12:20PM HEY ALEXA, WHY SHOULD FINANCIAL ADVISERS CARE WHAT FAANG IS UP TO?

Speaker: Steve Crawford, Owner and Financial Coach, Experience Wealth

12:40PM LUNCH

1:40PM
FINANCIAL TECHNOLOGY - LIVE DEMOS
Hans Egger, Managing Director, Astute Wheel
Glenis Phillips B Ed, SF FIN, Designer and Founding Director of Financial Mappers

2:00PM
**STRATEGIES FOR PROTECTING YOUR CLIENTS'
INVESTMENTS AGAINST CYBER RISK**
Speaker: Julian Plummer, Managing, Director, Midwinter and Kamino

2:20PM
CASE STUDIES: ADVISER INNOVATION IN PRACTICE
Speakers: Jess Brady, Co-Founder, Fox and Hare Wealth (Sydney only)
Steve Crawford, Owner and Financial Coach, Experience Wealth
Brett Evans, Managing Director, Atlas Wealth Management
Adele Martin, Founder Firefly Wealth

3:20PM COFFEE BREAK

3:40PM
POSITION YOURSELF AS AN ADVICE INNOVATOR
Ranked No 1 in the AFR's most innovative companies list in 2017, hear how and why Tricky Jigsaw embed innovation across everything they do, and discover the tools and frameworks that can help you to truly adopt an innovation mindset.
Speaker: Ben Cooper, Founder and Managing Director, Tricky Jigsaw (an M&C Saatchi Group Company)

4:40PM CLOSE OF CONFERENCE