



BARRON'S AUSTRALIA SUMMIT

24-25 FEBRUARY, 2020

SHERATON GRAND SYDNEY HYDE PARK



MONDAY, FEBRUARY 24, 2020

2:00 PM – 3:00 PM Grand Ballroom Foyer	Registration
3:00 PM – 3:10 PM Grand Ballroom	Welcome Remarks Sterling Shea , Barron's
3:10 PM – 4:00 PM Grand Ballroom	Strategizing & Analyzing Your Team's Development Paul Brady , Brady Associates Harry Mantzouratos , PDG Moderator: Vijay Srinivasan , CFS
4:00 PM – 5:00 PM Grand Ballroom	Bullish vs. Bearish: Opinion Outlooks for 2020 Hari Balkrishna Andrew Canobi Moderator: David Simon , Integral Private Wealth
5:00 PM – 6:30 PM Grand Ballroom Foyer	Cocktail Reception
6:30 PM – 8:30 PM Grand Ballroom	Dinner & Keynote Speaker Kevin Gaskell Interviewer: Sterling Shea , Barron's
8:30 PM – 9:30 PM The Gallery	Top Adviser Reception: For Current & Past Top Ranked Advisers & Strategic Partners

TUESDAY, FEBRUARY 25, 2020

8:00 AM – 9:00 AM Grand Ballroom Foyer	Registration & Breakfast
9:00 AM – 9:10 AM Grand Ballroom	Opening Remarks Sterling Shea , Barron's
9:10 AM – 10:00 AM Grand Ballroom	International Perspective - Insights & Best Practices from Top US Advisers Patti Brennan , Key Financial, Inc. Adam Carlin , Morgan Stanley Private Wealth Management Moderator: Sterling Shea , Barron's



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10:00 AM – 10:50 AM Grand Ballroom	Macro Risks and Opportunities in Today's Market Rob Almeida , MFS Investment Management Aiden Geysen , Vanguard Jonathan Shead , SSGA Moderator: Tim MacKay , Quantum Financial
10:50 AM – 11:10 AM Grand Ballroom Foyer	Refreshment Break
11:10 AM – 12:00 PM Grand Ballroom	Setting a Strategic Vision for Your Firm to Achieve Organic Growth Sue Dahn , Pitcher Partners Charles Moore , Koda Capital Moderator: John Sullivan , Macquarie
12:00 PM – 12:50 PM Grand Ballroom	Analyzing the Geo-Political Environment and the Effect on the Market in 2020 Craig Vardy , BlackRock Interviewer: Matt Nicholls , Morgan Stanley
12:50 PM – 2:00 PM Grand Ballroom Foyer	Lunch
2:00 PM – 2:50 PM Grand Ballroom	Superior Service: How to Position Your Value to Your Clients Paul Ashworth , Cameron Harrison Keith Jones , Alteris Olivia Maragna , Aspire Retire Moderator: Chris Mather , BT
2:50 PM – 3:10 PM Grand Ballroom Foyer	Refreshment Break
3:10 PM – 4:00 PM Grand Ballroom	ESG Implementation: Strategy, Selection, and Measuring Outcomes Richard Brandweiner , Pental Alex Duffy , Fidelity Moderator: Scott Carmichael , Escala Partners
4:00 PM – 4:50 PM Grand Ballroom	Understanding and Preparing for Exponential Technology Ric Edelman , Edelman Financial Services LLC
4:50 PM – 5:00 PM Grand Ballroom	Awards Ceremony for Top Ranked Advisers



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5:00 PM – 6:30 PM

Cocktail Reception

2020 Agenda