

AUSTRALIA SUMMIT

29-30 August 2022 | Sydney, Australia

MONDAY, 29 AUGUST 2022

1:00 PM – 6:30 PM

REGISTRATION

Grand Ballroom Foyer

2:00 PM – 3:55 PM

AN INTERACTIVE MASTER CLASS

Hyde Park Room

The 5 Secrets of Successful Teams

Beverly Flaxington, Bestselling & Gold-Award Winning Author, The Collaborative

3:55 PM – 4:10 PM

REFRESHMENT BREAK

Grand Ballroom Foyer

4:10 PM – 5:00 PM

GENERAL SESSION

Hyde Park Room

Inflation, Interest Rate Rises, and Pricing Power - How Do These Macro Factors Affect the Outlook for the Australian Investment Market?

Tim Hext, Head of Government Bond Strategies, Pental
Paul Taylor, Head of Investments, Australia and Portfolio Manager of the Fidelity Australian Equities Fund, Fidelity International
Moderator: **Paul Ashworth**, Managing Partner, Cameron Harrison

5:00 PM – 6:00 PM

COCKTAIL RECEPTION

Grand Ballroom Foyer

6:00 PM – 8:00 PM

WELCOME DINNER & SPEAKER

Grand Ballroom

The Latest Geopolitical Intel

Beth Sanner, US Presidential Intelligence Briefer and 35-Year National Security Leader
Interviewer: **Jack Otter**, Global Head, Wealth and Asset Management, Barron's Group

8:00 PM – 9:00 PM

TOP ADVISOR RECEPTION

Hyde Park Room

For Current, Past Top Ranked Advisors & Strategic Partners

TUESDAY, 30 AUGUST 2022

AUSTRALIA SUMMIT

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8:00 AM – 5:00 PM

Grand Ballroom Foyer

REGISTRATION

8:00 AM – 9:00 AM

Grand Ballroom Foyer

BREAKFAST

9:00 AM – 9:10 AM

Grand Ballroom

WELCOME REMARKS

Chris Freeman, Chairman, Advisory Board, Barron's Group
Host: **Jack Otter**, Global Head, Wealth and Asset Management, Barron's Group

9:10 AM – 10:00 AM

Grand Ballroom

GENERAL SESSION

View from the Top: Barron's Hall of Famer Explains How 35 years of Perseverance has Paid Off.

Louis Chiavacci, Managing Director & Private Wealth Advisor, Merrill Lynch Private Wealth Management
Interviewer: **Matt Barthel**, Executive Editor, Wealth & Asset Management, Barron's Group

10:00 AM – 10:50 AM

Grand Ballroom

GENERAL SESSION

Q & A: Where in the World Can an Investor Find Value?

Matt Reynolds, Investment Director, Capital Group
Sam Ruiz, Portfolio Specialist, T. Rowe Price
Claire Smith, Alternatives Director, Schroders
Moderator: **Dean Gilkison**, Director, Broadleaf Financial Group

10:50 AM – 11:10 AM

Grand Ballroom Foyer

REFRESHMENT BREAK

11:10 AM – 12:00 PM

Grand Ballroom

GENERAL SESSION

How to Create "One of the Best Places to Work"

Hugh Robertson, Centaur Financial Services
Charlie Viola, Pitcher Partners Sydney Wealth Management
Moderator: **Jorden Brown**, Managing Director, Financial Intermediaries (Australia & New Zealand), Capital Group

12:00 PM – 1:05 PM

Grand Ballroom Foyer

LUNCH & DISCUSSION GROUPS

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Attract & Retain Talent

Beverly Flaxington, The Collaborative

Culture for High Performance

Eliza Weaving, Capital Group

Elevation of Next Gen Leaders to Ownership Positions

Dean Gilkison, Gilkison Group

Impact Investing

Bianca De Melo, Macquarie Group

Intergenerational Wealth Transfer

David Miller, Capital Group

Investing Globally

Louis Chiavacci, Merrill Lynch Private Wealth Management

Leading Clients toward Philanthropy & Social Impact

Chris Mather, BT Financial Group

Succession Planning

Sue Hadden, Morgan Stanley Wealth Management

Technology & Cyber Security

Neil Kendall, Tupicoffs, The Independent Financial Planner

1:05PM – 1:10PM

Grand Ballroom Foyer

REFRESHMENT BREAK

1:10 PM – 2:00 PM

Grand Ballroom

GENERAL SESSION

Pursuing Durable Long Term Value

Iris Davilla, Managing Director, BlackRock

Interviewer: **Paula Gigler**, Director, BlackRock

2:00 PM – 2:50 PM

Grand Ballroom

GENERAL SESSION

ESG in a World Defined by Upheaval

Paul Ashworth, Cameron Harrison

Troy Theobald, RFS Advice

Moderator: **Chris Mather**, Head of Distribution, BT Financial Group

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2:50 PM – 3:10 PM

Grand Ballroom Foyer

REFRESHMENT BREAK

3:10 PM – 4:00 PM

Grand Ballroom

GENERAL SESSION

How Data and Technology Are Increasingly Driving Innovation in Commercial Real Estate

Steve Bulloch, Managing Director and Head of Australia, PGIM Real Estate

Sasanka Liyanage, Head of Research, Charter Hall

Moderator: **Shaun Bornstein**, Head of Managed Product & Capital Markets, Morgan Stanley Wealth Management

4:00 PM – 4:50 PM

Grand Ballroom

GENERAL SESSION

Teams of the Future: What Will They Look Like and How Should They Be Structured?

Claire Mackay, Quantum Financial

Lynda McKie, Elston Private Wealth

David Simon, Integral Private Wealth

Moderator: **Sue Hadden**, Senior Practice Management Consultant, Morgan Stanley Wealth Management

4:50 PM – 5:00 PM

Grand Ballroom

AWARD CEREMONY

Awards Ceremony for Top Ranked Advisors

5:00 PM – 6:00 PM

Grand Ballroom Foyer

COCKTAIL RECEPTION