

Agenda

Wednesday 18 October 2017

8:30am – 8:50am	Welcome & Housekeeping <i>Andrew Klein, MC</i> New Zealand 1 & 2		
8:50am – 9:00am	Message from the Professional Adviser Council <i>Paul Kearney, Chairman, PAC</i> New Zealand 1 & 2		
9:00am – 9:30am	Opening & Business Update <i>Mark Fisher, Managing Director, Securitor</i> New Zealand 1 & 2		
9:30am – 9:40am	Charity - Alzheimer's Australia		
9:40am – 10:45am	Keynote Presentation <i>Dr Adam Fraser, Peak Performance Researcher</i> New Zealand 1 & 2		
10:45am – 11:05am	Morning Tea		
11:05am – 11:55am Workshop 1	Making Income Last a Lifetime New Zealand 3	Managed Fund, ETF & LIC Research: Overview & Latest Insights From Morningstar New Zealand 4	Marketing for Maximum Impact Marlborough 1 & 2

11:55am – 12:40pm Workshop 2	Managed Accounts – Are They Worth All the Hype? New Zealand 3	DeBono's Six Hats of Super Contributions (and Counting...) New Zealand 4	Positively Productively Profitable Marlborough 1 & 2
12:40pm – 1:40pm	Lunch New Zealand Promenade		
1:40pm – 2:30pm Workshop 3	How to Build Winning Portfolios in Challenging Market Environments New Zealand 3	Peer session -From Good to Great and Then Good Again Marlborough 1 & 2	Xploring the Xciting OpportunitiesMaking Your Business More Xceptional New Zealand 4
2:30pm – 3:15pm Workshop 4	Insurance and Super Case Study Marlborough 1 & 2	Do you Compete or Co-operate? The Future Approach for Accountants & Financial Advisers to Collaborate New Zealand 3	Understanding Mindsets: How to Recognise and Unpack Constraining Beliefs New Zealand 4
3:15pm – 3:40pm	Afternoon Tea		
3:40pm – 4:30pm Workshop 5	Understanding Portfolio Construction to Meet the Needs of an Aging Australia New Zealand 3	The Hobbit SMSF New Zealand 4	Life Insurance Code of Practice - What it Means for You Marlborough 1 & 2
4:30pm – 5:30pm	Keynote Presentation: <i>Sir Graham Henry, One of the Most Successful Rugby Coaches of All Time</i> New Zealand 1 & 2		
5:30pm – 5:40pm	Day 1 Close		
7:00pm – 10:00pm	Welcome Reception – Welcome to Aotearoa <i>Dress code: Smart Casual</i> Auckland War Memorial Museum		

Thursday 19 October 2017

8:30am – 8:40am	Welcome & Housekeeping			
	<i>Andrew Klein, MC</i>			
	New Zealand 1 & 2			
8:40am – 10:10am	A Journey in Using Art and Science to Meet Investors' Objectives			
	<i>Andrew Lill, CIO, Morningstar</i>			
	<i>Ben Davis, Partner & Head of Investment Partners, Zenith</i>			
	New Zealand 1 & 2			
10:10am – 10:35am	Morning Tea			
10:35am – 11:25am	Express Experts			
	Auckland 1 & 2			
11:25am – 12:15pm	Meeting Client Goals in a Low Return Environment	An Exercise in Time Travel- For a Future Happening Now	The Advice Process and Compliance Through the Lens of Strategy Choices	The New World of Estate Planning Under the Super Reforms
Workshop 6				
	Marlborough 2	New Zealand 3	New Zealand 4	Auckland 4
12:15pm – 1:00pm	Australian Equities: What's Different this Time?	Centres of Influence - A Vital Component of Business Success	A Death Benefit is a Death Benefit Except When it's Not a Death Benefit	Empowering Your Clients Through Technology
Workshop 7				
	Auckland 4	New Zealand 3	New Zealand 4	Marlborough 2
1:00pm – 2:00pm	Lunch			
	Auckland 1 & 2			
2:00pm – 2:50pm	The Folly of Consensus Thinking	Personalities - How To Increase Your Understanding of Others, So That You Can Be More Effective	Why Moats Matter – Identifying Great Businesses at Great Prices	Prove Your Value as a Trusted Adviser
Workshop 8				
	Marlborough 2	New Zealand 3	Auckland 4	New Zealand 4

2:50pm – 3:35pm Workshop 9	Scalable Advice: What's in Everyone's Best Interest in 2025 and beyond?	Omnipresence is the Place to Live	Evolving the Advice Process	Are TBCs TBC or TBC?
	New Zealand 3	New Zealand 4	Auckland 4	Marlborough 2
3:35pm – 4:00pm	Afternoon Tea			
4:00pm – 5:00pm	Keynote Presentation <i>Andre Eikmeier, Co-Founder & Joint CEO, Vinomofo</i> New Zealand 1 & 2			
5:00pm – 5:10pm	Day 2 Close			
5:30pm – 6:30pm	First Time Delegate Drinks			
6:30pm – 10:00pm	Free Evening			
10:00pm – Late	The Lounge			

Friday 20 October 2017

7:30am – 8:15am	Stella Network Breakfast <i>Julia Hartley Moore</i> New Zealand 3			
8:30am – 8:40am	Welcome & Housekeeping <i>Andrew Klein, MC</i> New Zealand 1 & 2			
8:40am – 9:30am	Empowering Yourself to Live Your Best Life <i>James Tomkins, Olympic Rower & National Sales Manager at UBS Asset Management</i> New Zealand 1 & 2			
9:30am – 10:15am Workshop 10	Navigation Change, Populism and the Distortions of Passive Management New Zealand 3	Avoid the Tiki-Trip to the Wop-Wops Marlborough 2	Content Driven Marketing – How to Ensure What You Are Sending Your Clients Isn't the Same as Everyone Else Auckland 4	Success Along the High Road New Zealand 4
10:15am – 10:35am	Morning Tea			
10:35am – 11:25am	It's in Everyone's Best Interest to Stay Safe by Swimming Between the Flags <i>Peter Hall, National Manager, Monitoring & Supervision Conduct, Assurance and Governance, BT Financial Group</i> New Zealand 1 & 2			
11:25am – 12:20pm	Building Resilient Businesses: Leaders, People and Clients in a Changing Environment <i>Bruce Cotterill, Keynote Speaker</i> New Zealand 1 & 2			
12:20pm – 1:00pm	Lunch Auckland 1 & 2			

1:00pm – 2:00pm **Keynote Presentation**
Chris Riddell, Futurist
New Zealand 1 & 2

2:00pm – 2:20pm Day 3 – Close

7:00pm – Late **Gala Celebration**
Dress code: Black tie
