

Express Experts



Josh Hall
Investment Specialist

Generating Consistent, Predictable and Reliable Income for Retirees

Asset Class: Multi Asset

For many investors, the conventional approach has most often been to invest in a diversified portfolio of equities, bonds, and property investments.



Elise Sanders
Regional Manager

Innovative Solutions When Dealing With Life Stages as Part of Your Insurance Philosophy.

Asset Class: Insurance

Whatever milestone in life your clients are at, AIA Australia offers a flexible life insurance pricing option to suit by matching premium structures to clients' needs. As well as stepped and true level premium solutions, AIA has unique premium options such as Optimum premium which combines the upfront cost effectiveness of stepped premiums with the consistency and longer term savings of level premiums and our latest Term Level premiums which provide the predictability of a true level premium for selected terms of 5, 10, and 15 years, which can help their clients avoid yearly stepped premium increases.



John Meigan
National Sales Manager
Retail Sales

The Merits of Direct Infrastructure

Asset Class: Infrastructure

How to utilise direct Infrastructure in a client portfolio.



Mark Mazzarella
Investment Analyst

Retail and Online

Asset Class: Property

We are not the same as the US. Why?

- Less vacancy, arguably more efficient retailers
 - US lags Asia Pacific in retail mall space use: slow transition from apparel to food and experiences
 - The US is over supplied
 - The US is over exposed to department stores
- What can we conclude from this in the Asia Pacific REIT markets?



Denise Rodger
Senior Business
Development Manager

Claims - The Role of the Advisers

Asset Class: Insurance

Claims is arguably the most important aspect of the insurance process but it's also an area we don't spend enough time on discussing and understanding. Come and listen to some statistics around the common causes as well as the trends over the last ten years. In this session we will also look at the importance of having an adviser involved in the claims process.



Josh Persky
Vice President, Model
Portfolios and Solutions

How to Build a Multi-Asset Diversified Portfolio in Under 10 mins

Asset Class: Multi Asset

With so much complexity, is it possible to build a low cost diversified portfolio in under 10 minutes?

In this session we will model a tool that allows you to build a custom ETF portfolio costing less than 40bps.



Life Insurance

Marcus Chan
Business Development
Manager

Aligning Your Advice & Insurance Philosophy Through Risk Researcher

Asset Class: Insurance

What are your non-negotiables when providing sound insurance advice for your clients? Is your research truly reflective of your insurance philosophy? Let Marcus show you how you can align your advice to reflect your insurance philosophy, allowing you to save time & avoid potential compliance issues.



Platforms

Sid Cavallaro
New Business Manager

Tailored Portfolios - Tips & Techniques

Asset Class: Platforms

With Securator's MDA license now in place advisers are taking advantage of the Tailored Portfolio functionality within Panorama to provide efficient portfolio management solutions to their clients. This practical session outlines the tips and techniques involved in setting up and managing Tailored Portfolios.



Dave Bolsom
Key Account Manager

Managed Portfolios – Are They All They Are Cracked Up To Be?

Asset Class: Separately Managed Accounts

This session will explore managed portfolios, why they are growing in popularity and the benefits to advisers. We will also discuss how to use managed portfolios and some of the SMA options available to you today.

Global trends and their impact on the Australian financial advice market

Asset Class: Multi Asset



Craig McDonald
Business Development
Manager Investments

There are a range of factors driving significant change in various industries across the globe. We hear about these everyday but what does it really mean for you, your business and your clients? In this presentation, the Colonial First State Strategy team bring together insights from global thought leaders to identify eight megatrends. We will provide insights into these megatrends and prompt the audience to consider how they may impact the retail wealth value chain in Australia, including your clients and advice business models.



Claudia Ramsey
Senior Business
Development Manager,
Fidante Partners

Generating Income Streams Whilst Protecting Capital in a Rising Interest Rate Environment.

Asset Class: Australian Equities and Fixed Interest

With the progressive normalisation of interest rates globally, investors are looking for investments that will deliver income whilst protecting their capital in a rising rate environment. Fidante Partners will explore opportunities to deliver income and protect capital across Australian equities and Global Credit Markets introducing solutions by Merlon Capital and Bentham Asset Management.



Adam Mackie
Business Development
Manager

Artificial Intelligence - Why We Need To Take Notice

Asset Class: Global Equities

Artificial Intelligence (AI) is having a profound impact on industries and companies around the world, sometimes in areas where you least expect it. At Fidelity, our research team has been monitoring this 21st Century theme for some time. In this session we take a deep dive and look at some real stock stories. Explore how fast these companies are moving, the impact they are having on their sectors and how we need to factor these rapid changes when making investment decisions. Examples of companies that demonstrate core attributes of viability, sustainability and credibility



Matt Hattersley
Key Account Manager

Rising Rates – What You Need to Know

Asset Class: Fixed Income

Will interest rates continue to rise? Despite still lingering near historic lows, many investors are concerned that rates may have nowhere to go but up.

Although interest rate changes are difficult to predict, now may be a good time to think about the impact rising rates could have on portfolios in order to position them appropriately.

In this presentation you will learn more about:

- What drives interest rates
- Why some sectors are less rate sensitive than others
- The value of active management in a rising rate environment



Steven Taylor
State Manager, QLD

Long Short Investing in the Australian Equity Market

Asset Class: Australian Equities

This session will discuss the various styles of long short investing and help to demystify the process of shorting stocks. The aim of the presentation is to help advisers understand how these strategies add value to a portfolio whilst still managing overall risk and providing diversification to client portfolios.



Pragun Babhoota
Key Account Manager

Targeting Trains or Tracks

Asset Class: Infrastructure

The session will cover infrastructure as a whole and how applying a distinctive definition on infrastructure investing creates purity and defensiveness in a portfolio.



Alexander Ordon
Key Account Manager

A Low-Cost Core Solution That Puts Active Stock Picking at the Heart of your Portfolio

Asset Class: Global Equities

Searching for a core international equity solution that combines the best of indexing and active in one low-cost solution?

The JPMorgan Global Research Enhanced Index Equity Fund (Hedged and Unhedged) is a core index-like portfolio staying regional, sector and style neutral, while exploiting our global bottom-up fundamental stock insights to deliver consistent real alpha in a risk controlled way.



Matthew Potter
Investment Specialist

Why Value Matters in Your Global Equity Portfolio?

Asset Class: Global Equities

Over the last 10 years global equity growth strategies have performed well. But over the last 40 years value strategies have outperformed, this presentation looks at the analysis and potential opportunities from reallocating from growth to value in global equities.



Allan Evans
Key Account Manager

Are the Winners Today the Losers of Tomorrow??

Asset Class: Global Equities

The pace of technological change in the past 10 years is as nothing to the rate of change that will take place over the next investment cycle and beyond, and it may fundamentally change how companies are valued and portfolios are constructed. With the rising concern on disruptive technology and interest rates – what does it all mean?



Simon Blanchflower
Head of Asia Pacific,
Altrinsic Global Advisors

Why Now for Global Value?

Asset Class: Global Equities

Over the last few years, with the race to the bottom in interest rates globally, value style investing has faced significant headwinds. More recent performance suggests that the tide is turning and the 'forgotten style' is back in favour (particularly as fundamentals return with the looming normality of interest rate policy). Hear Simon Blanchflower from Altrinsic discuss why the time is right for 'global value' and why it should form part of your thinking when constructing global equity portfolios.



Michael Maughan
Portfolio Manager

Conflict or Compliment: Portfolio Construction to Achieve Growth and Stability of Income

Asset Class: Australian Equities

Can Australian Shares meet the demands of providing capital growth and simultaneous stable income over the long term?
With the number of Australians aged between 65 and 84 are expected to double over the next four decades, the balance between income and growth opportunities in domestic equities is an increasingly relevant for consideration for Australian investors. It can be tempting to blindly chase high-yield stocks or growth sectors, often overlooking the challenges of longevity and concentration risk.

Michael Maughan, Portfolio Manager at Nikko AM Australia will share his ideas on the

construction of a diversified portfolio, balancing longer term growth with stable income through an intrinsic value approach. Referring to stock specific examples, Michael will demonstrate the capital returns in conjunction with a regular income stream that can be achieved through the identification and timed exploit of market anomalies that active management allows.



Keenan Bunning
Business Development
Manager

Return of the Jedi

Asset Class: Global Equities

Following years of falling interest rates around the world, rates have started to rise again. We believe this will be a catalyst for outperformance from value investing. Perpetuals global share fund has significantly outperformed the index over the last year and now has an excellent 5 year track record. Come and hear why now is the time to consider placing Perpetuals proven process of value and quality into your portfolios.



Haydn Scott
Vice President,
Account Manager

Busting the Bond Myths

Asset Class: Fixed Income

- Myth #1 – We are entering a bond bear market
- Myth #2 – Rising Rates are bad for bonds
- Myth #3 – Bonds don't protect portfolios at low level of yields
- Myth #4 – You can't make money in bonds at low levels of yield
- Myth #5 – Duration is bad



Nathan Ahboo
Regional Manager

Jenny Pang
Regional Manager, NSW,
SA and ACT

Infrastructure: The Evolution of an Asset Class

Asset Class: Infrastructure

Listed infrastructure has become a mainstay of client portfolios over the last decade and has improved portfolio efficiency providing attractive returns with lower volatility than other growth assets. However, demand from investors continues to evolve - as a pioneer in this space, this presentation will explain how combining different types of infrastructure holdings in a portfolio can tailor the outcomes to deliver for different investor needs.



Sam Besley
Regional Manager -
Wholesale

Robeco Boston Partners Global Premium

Asset Class: Global Equities

Boston Partners have an impressive 21 year history managing equities portfolios using the same value discipline anchored in three fundamental truths;

- Low valuation stocks outperform high valuation stocks.

- Companies with strong fundamentals (high returns on invested capital) outperform companies with poor fundamentals.

- Stocks with positive business momentum (improving trends / rising earnings) outperform stocks with negative momentum.

In the short express experts session, we will discuss the three circles characteristics which the Boston Partners team have employed to achieve consistent outperformance of their equities strategies, how these are identified, measured and incorporated into a portfolio.

Schroders

Jasmine Del Villar
National Account Manager

Mind the Personal Funding Gap

Asset Class: Multi Asset

Mind the personal funding gap - it's bigger than people think and some investment strategies can help manage it. Managing the personal funding gap in a defined-contribution plan requires knowing how much money people will need in retirement. Having estimated that requirement, we can measure the shortfall and offer suggestions on how to reduce that gap. Using calculations based on the Association of Superannuation Fund of Australia's (ASFA) comfortable income targets, this session will provide a guide on how certain investment solutions can help bridge the savings gap.



Darren Hall
National Sales Manager

Rethinking Fixed Income Investing

Asset Class: Fixed Interest

Join Darren Hall for a topical and informative session as highlights how dynamic and active portfolio construction can drive diversification for clients' portfolios when it matters most, while continuing to deliver the traditional qualities of fixed income.



Angelo Porcaro
Sales Development
Manager, VIC

Re-thinking and Redefining Adviser Education: TAL Risk Academy

Asset Class: Insurance

The TAL Risk Academy has been designed to help you and your business grow your skills while offering support as we transition with the new professional standards.

This session will take you through education pathway options with TAL Risk Academy, tools you receive during and after courses and flexible options for continued education within the four key pillars:

- 1) Essentials Program for new advisers and support staff. This focuses on the operational aspects of insurance and client management.
- 2) Advice Program for advisers with technical expertise. This provides comprehensive customer and insurance strategies to help deliver better solutions to customers.
- 3) Masters Program for experienced advisers. This is designed to advance thinking and to help advisers deliver optimum solutions to customers and centres of influence.

4) Business Management for all advisers and their support staff. This helps in building customer engagement and business management skills to thrive in today's evolving advice and digital landscape.



Edward O'Neill
Director, National Sales
Manager

What Makes a Business Successful? Observations From a Decade of Investing in Small Caps

Asset Class: Australian Equities

A presentation based on the insight our Australian Small Caps team have gained from over a decade of investing in Australian small caps on what makes a small business successful. Using real examples of Australian companies that have both succeeded and failed, Stephen Wood will share the key insights on the top attributes that all successful businesses share - and how advisers can apply these insights to their own businesses.



(Investments)

Charles Stodart
Strategic Account Manager
Investments

Actively Investing for Growth in a Populist Age

Asset Class: Global Equities

Macro-economic events can cause uncertainty and volatility in global equity markets. Policy initiatives may do the same. However, regardless of how any political agendas may unfold, there will always be companies experiencing positive change or 'earnings acceleration'. This is important because company earnings are a key factor in stock price returns over the long term.

We discuss a number of investment opportunities exhibiting earnings acceleration that could deliver long term performance.



(Insurance)

Jessica Brady
Risk Strategy Specialist

Kirrily Stevens
Business Development
Manager, Life Risk

Unlocking new Opportunities: Intergenerational Advice

Asset Class: Life Insurance

Australia is on the verge of the largest intergeneration wealth transfer in history. A significant portion of our population will be impacted yet advisers and clients appear ill prepared. The days of a 'one size fits all' service model are gone. This session examines why the traditional archetype of advice may no longer resonate and how businesses can revamp their engagement propositions to connect and remain relevant to all generations.