Plenary Speakers

Bruce Cotterill

Adviser to Business Leaders

Bruce describes his career as a "vertical learning curve".

Bruce is a "transformation leader" with extensive experience across a range of industries – notably real estate, media, financial services, technology and retail – and a variety of ownership models, including both public company and private equity.

As CEO he lead turnarounds at real estate group Colliers, Kerry Packer's ACP Magazines, and iconic New Zealand sportswear company Canterbury International. In 2008, he was asked by shareholders to step in as CEO of Yellow Pages Group to lead that Company through a period of dramatic change and the restructure of the Company's $1.8 billion of debt.

Bruce is a passionate leader of change, and is genuinely interested in business performance improvement. He is now a professional director and advisor, and is a highly regarded business communicator assisting managers, leaders and their organisations to improve their performance and profitability.

Ben Davis

Partner, Head of Investment Consulting, Zenith

Ben is a Certified Investment Management Analyst (CIMA) and Chartered Alternative Investment Analyst (CAIA) and is a member of the Investment Management Consultants Association (IMCA) and the Chartered Alternatives Investment Analyst Association. In 2008, Ben was awarded the BlackRock sponsored CIMA Scholarship for Retail Managed Funds and Master Trust Research Analysts.
Since joining Zenith, Ben has been involved in leading manager reviews across a range of asset classes including international equities, fixed interest, mortgages, property and alternatives. Ben has completed on-site manager reviews in several of the world's major financial capitals across the US, Europe and Asia. Ben has also specialised in portfolio construction and the formulation of customised approved product lists for financial advisers, dealer groups and master fund and wrap account providers. Ben now focuses on the management of the Sector Research division.

Andre Eikmeier

Co-founder and Joint CEO, Vinomofo

Andre is an Entrepreneur, Co-Founder + Joint CEO of Vinomofo, one of Australia's fastest-growing companies and a leader in innovation, disruption and culture. Vinomofo launched in April 2011 from a garage in Adelaide and has since grown quickly and profitably to a run rate of over $50m revenue, 450,000 members and a team of over 100. After a successful launch in New Zealand in June 2016, Andre and Vinomofo have global visions.

Andre and his team have proven to be game-changers in the wine industry, removing some of the 'bowties and bullshit' of the elitist wine crowd. He believes that everybody should be able to enjoy good wine and Vinomofo embraces the power of social media and digital content, to engage and entice a new generation of wine consumers.

Andre is passionate about culture in the workplace. He is a believer in the importance of outstanding customer service and harnessing the power of your customer base to promote your product.

Dr Adam Fraser

Peak Performance Researcher

Stress, deadlines, interruptions, negative emotions, bad habits and long working hours. When it's not possible to control the environment that creates challenges, the answers lie within us.

Dr Adam Fraser is experienced at facilitating solutions for individuals, teams and organisations helping them to improve performance. Adam has worked with elite sports people, armed forces and top business professionals in Australia and worldwide. He has channelled his unique insight and research into a series of ground breaking presentations. Adam is a speaker who can truly help people effectively manage their mindset and energy with positive results.

Peter Hall

National Manager, Assurance and Governance, BT Financial Group

Peter brings over 20 years' experience in the governance and compliance field working in various Senior roles with a number of different sized groups including NAB, MLC, AMP, RI Advice and Financial Services Partners (previously part of ING and now ANZ Group), Total Financial Solutions Australia (TFSA) and the netwealth Advice Group.

Peter specializes in providing strategic governance and compliance advice and guidance in the ever changing regulatory environment and leading high performing teams.

Sir Graham Henry

One of the Most Successful Rugby Coaches of All Time

Sir Graham Henry is one of New Zealand's most in demand speakers - having coached the All Blacks to glory in the 2011 Rugby World Cup, and going on to be awarded Coach of the Year at the IRB awards, receiving this award for a record 5th time.
Graham finished his All Blacks career as one of the most successful rugby coaches of all time: he coached the All Blacks to 88 wins in 103 Tests for a winning percentage of 85.4 percent. As well as winning Rugby World Cup 2011, the All Blacks have held the Bledisloe Cup every year since 2003, won the Investec Tri Nations five times and achieved three Grand Slams against the Northern Hemisphere Home Unions.

Graham's speaking topics include - the high performance environment, team culture, motivation, team development, and leadership. His presentations are readily applicable to the business environment, as well as the sporting arena.

Craig Hudson
Country Manager NZ, Xero
(Principals Forum)

As Country Manager for New Zealand, Craig is a key member of the global sales leadership team, responsible for driving relationships with government, financial institutions, enterprise, and promoting the small business economy. Craig has been with Xero for several years, and returns to New Zealand from the United Kingdom, where he led Xero's entrance into Europe, the Middle East and South Africa markets.

Craig is a father of four and a successful former rugby player who spent more than eight years playing professionally in New Zealand, France, England, and Wales.

Andrew Inwood
Principal, CoreData
(Principals Forum)

Andrew Inwood is the founder and principal of CoreData and has more than 26 years' experience in the Australian financial services industry.

He worked for Rothschild Australia Asset Management where he headed the marketing team for before moving to AMP Investments where he spent more than a decade. During his time at AMP he was seconded to Virgin Direct in the UK to help establish the finance and investment arm of the group. Andrew returned to Australia to be Marketing Director of Wizard Home Loans. From Wizard he moved to Telstra where he spent three years as GM of Applications and hosted services before leaving to start CoreData.

Richard Jones
Director & Principal, Wellbeing Matters
(Principals Forum)

Richard's corporate career includes senior executive positions with iconic brands such as British Petroleum (BP) (5 years), the UK's largest corporate entity, and Royal Worcester Spode (5 years).
In 2002 Richard and his family relocated from the UK to Australia to pursue a much needed change in lifestyle balance. Following 18 months of training and mentorship at The Corporate Excellence Group, an Australian executive coaching and training company, Richard formed his own coaching and leadership development entity, 'Wellbeing Matters', at the end of 2005.

Wellbeing Matters is a growing business, coaching executives ranging from CEOs, GMs and senior managers of ASX listed companies and professional services companies, as well as the Owners/MDs of SMEs.

Richard's coaching is focused on delivering outcomes for both the individual and their business. Richard places particular emphasis on creating self-awareness, unlocking potential, goal setting and strategic planning, communication skills development, leadership skills development, organizational and cultural change and utilizing team dynamics.

Andrew Lill
CIO, Morningstar

Andrew joined Morningstar Investment Management Australia Limited in January 2014. He is responsible for leading the Morningstar Investments team in Australia and developing Morningstar Investment Management's investment capabilities and thought leadership profile in the Asia Pacific region. Andrew chairs the Asia Pacific Investment Policy Committee, and the Manager and Security Selection Sub-Committee. He is also a member of the Asset Allocation Sub-Committee and Portfolio Construction Sub-Committee.

Andrew has over 23 years' experience in advising and managing Institutional Funds and Investment teams in Australia, Asia, and the United Kingdom. He worked most recently at AMP Capital Investors as Head of Investment Solutions in the Multi-Asset Group, and before that, Head of Investment Specialists, Listed Assets.

Recep Peker
Research Director, Investment Trends ***(Principals Forum)***

Recep Peker leads the Investment Trends Wealth Management research team, which identifies and evaluates emerging trends relating to consumers, investors, SMSFs, financial planners and investment technology in Australia and the UK.

Recep frequently presents to executive and leadership teams in leading financial services organisations, speaks at key industry conferences and events, and regularly contributes to industry media.

Prior to joining Investment Trends in 2009, he graduated first in his honours class in economics at the University of Technology, Sydney, and gained first-hand experience of the advice industry in a boutique financial planning practice.

Chris Riddell
Futurist

Chris Riddell is Australia's most sought after futurist, and an award-winning, industry-recognised keynote speaker on digital. He is also a renowned strategist and global emerging trend spotter for businesses and leaders in today's disrupted world.

A global trailblazer, Chris Riddell has worked for some of the largest and most successful companies and brands in the world. Having lived and worked in the UK, Saudi Arabia, Dubai, Kuwait, China, New Zealand and Australia, his understanding of our new world is compelling and thought provoking, to say the least.

As a recognised futurist and speaker on digital, Chris has transformed the platform for delivering keynote presentations, and what it means to be an inspiring speaker. His award-winning events are highly acclaimed for being the most energising and immersive experiences around.

James Tomkins
Olympic Rower & National Sales Manager, UBS Asset Management

James is a world class rower, having competed in six Olympic games, winning three gold medals and one bronze medal. He is currently Chairman of the Australian Olympic Committee's Athletes Commission, on the board of the Sport Australia Hall of Fame and on the board of the Australian Drug Foundation.

James is National Sales Manager at UBS Asset Management; he is responsible for the implementation of UBS Asset Management's managed funds initiative in Australia, with primary responsibility for Victoria, Western Australia and Tasmania. In this role James works closely with financial advisers and intermediaries, research personnel and administration service providers.

Prior to joining UBS, James was a Senior Account Manager at BT Investment Management for six years. James has also worked at ABN Amro and Westpac Banking Corporation.

Andrew Klein
Master of Ceremonies

Director of SPIKE Presentations (helping you get your point across) Andrew is a Professional MC and Presentation Skills trainer. A former corporate lawyer, Andrew brings his casual yet corporate style to proceedings, adding an extra element with his humour and creativity.

For the past 17 years, he has become well-known on the conference circuit in Australia and Asia, for his ability to involve the audience in proceedings, his revealing speaker introductions, his improvisational skills and ability to adapt to different audiences.

Apart from MC'ing, Andrew is a professional corporate speaker and trainer and runs educational and highly entertaining workshops in Presentation Skills and Pitching for Business.

Workshop Speakers

Mark Angus

National Insurance Manager, BT Group Licensees

With over fifteen years of experience in financial services, Mark Angus is currently the National Insurance Manager for BT Group Licensees. During this period he has worked for BT, MLC and AMP in various roles including as Insurance BDM and Practice Development Manager.

In his current role, Mark specialises in working with practices wanting to grow their insurance revenue, helping them to implement effective insurance sales strategies.

Katherine Ashby

National Manager – Product Technical, BT Life

Katherine is the head of technical for BT Life Insurance. Her career has included roles in advice, research, product development and technical. She presents regularly for financial advisers, accountants and customers about insurance, superannuation, SMSFs and estate planning strategies.

Katherine writes for publications including Kaplan, the AFA magazine, Financial Standard, Risk Adviser and Financial Planning magazine.

In 2014 she was awarded the Women in Financial Services Insurance award. In 2015 Katherine was awarded the inaugural Australia & New Zealand Institute of Insurance and Finance (ANZIIF) Young Insurance Professional of the Year award.

Mark Atherley

Director of Breathe Life NZ & Breathe Homeloans Ltd

Mark is the Director of Breathe Life (NZ) Ltd & Breathe Homeloans Ltd, all trading as Breathe. Originating from Cornwall in the UK, he now lives in Helensville together with his wife Paula and 3 of their 4 children. In addition to this they are specialist carers and permanently foster 3 ‘challenging, but equally amazing young children’.

Mark is passionate about education and well being for children and assists the local community with this, with the help of Rotary, St Johns Charitable Trust, Bridge to Hope and other charitable organisations.

Mark has been an adviser & business owner most of his working life and enjoys working with other business owners and professionals. He especially enjoys helping families achieve their goals in regards to their own personal risk and mortgage planning not just their businesses.

Hari Balkrishna

Associate Portfolio Manager,
T. Rowe Price Global Equity Fund

Hari Balkrishna is an associate portfolio manager for the Global Growth Equity Strategy in the Equity Division of T. Rowe Price. Mr. Balkrishna is a vice president of T. Rowe Price Group, Inc. and T. Rowe Price International Ltd.

Mr. Balkrishna has nine years of investment experience. He completed an internship at T. Rowe Price in 2009. Prior to joining the firm in 2010, he worked at Goldman Sachs, Sydney, Australia, in the financial institutions group of the Investment Banking Division.

Mr. Balkrishna has a bachelor of commerce in finance and accounting (university medal and first-class honours) from the University of New South Wales and also has earned an M.B.A., with distinction, from Harvard Business School.

Jessica Brady

Risk Strategy Specialist, Zurich

Jessica is a Risk Strategy Specialist for Zurich's Life risk business, recently joining the team from Macquarie Wealth. She has also previously worked with the Commonwealth Bank.

Jessica is currently the youngest member of the AFA NSW committee, having held her position since 2011. She is passionate about advocating the "value of Advice", speaking frequently at conferences and universities, raising awareness of financial planning as a career path, as well as supporting the Financial Planning Student Group (FPSG) and acting as a panel judge for the FPSG Student initiative.

Adam Cassidy

Practice Advice Specialist – Accountants,
BT Group Licensees

Adam is the Practice Advice Specialist for BT Group Licensees, charged with the responsibility of helping Accountants who have made the decision of entering into the world of financial planning.
Adam has been working in the financial services industry since 2009 with his key areas of expertise in governance, development and management of AFSL's. He has extensive experience in the development of new advisers to the financial planning industry and is passionate about providing a supportive environment through his ability to build and foster strong relationships.

Adam is also a match official/referee in the NRL so knows the importance of being an effective communicator and is no stranger to making decisions in high pressure situations.

Martin Conlon
Head of Australian Equities, Schroders

Martin is Head of Australian Equities. He is a fund manager and involved in the portfolio construction process for Australian Equity portfolios, while also retaining analytical responsibilities for the Diversified Financials, General Insurance, Life Insurance, Telecommunications, Engineering & Gold & Construction Services.

Martin joined Schroders in 1994 and was promoted to Head of Australian Equities in 2003. Prior to joining Schroders he was an accountant at Ernst & Young. He holds a Bachelor of Economics from Macquarie University, a Graduate Diploma in Applied Finance and Investment and is a qualified Chartered Accountant.

Sarah Conte
Senior Manager, Advice Technical and Regulatory, BT Financial Group

Sarah Conte is the Senior Manager, Advice Technical and Regulatory for BT Advice. She leads a team of Regulatory and Technical specialists who develop business and strategic solutions for financial planners and the BT Advice business.

Sarah has over 17 years' experience in leading and delivering comprehensive technical solutions to advisers and their clients, the last 15 spent with BT Financial Group. She is a member of a number of industry working groups, including the Australian Bankers Association and the Financial Services Council. She has qualifications in Finance, Economics and Financial Planning as well as specialist advice accreditations in SMSFs and Margin Lending.

Andrew Cuttriss
Practice Advice Specialist – Accountants, BT Group Licensees

Andrew is one of the Practice Advice Specialists within BT Group Licensees and has over 10 of years' experience in the financial services industry.

During this time, Andrew has been on each sides of the fence being both Senior Financial Planner and a Senior Adviser for the New Zealand based Regulator – The Financial Markets Authority. This gives him a unique perspective on the advice industry and drives his desire to ensure quality advice is provided to all clients. Outside of work, Andrew is a self-confessed cricket tragic with a particular highlight of his 'glory days' being the wicket of ex New Zealand Captain Brendan McCullum (stumped off his 'terrible off spin'). He also loves to sneak out and catch a few waves.

Alex Donald

Head of Distribution, Ironbark Asset Management

Prior joining Ironbark Asset Management, Alex Donald was Head of Investment Sales for Colonial First State.

He was responsible for the distribution of Colonial's investment products in the Australian retail market, including research houses ratings, platform representation and the activity of the national sales team, as well as helping develop new products.

Alex began his career at Hill Samuel Asset Management in 1996 as an equities analyst on their global equities desk. He moved to Australia in 2001 and joined Zurich Investments where he helped restructure Zurich's retail sales business and as Head of Key Accounts was responsible for Zurich's research house, platform and dealer relationships.

Alex has a BA Hons degree in Politics and French from the University of Wales, Swansea.

Chris Douglas

Director, Manager Research Ratings, APAC, Morningstar

Chris is Director of Manager Research Ratings with Morningstar, a leading global provider of independent investment research.Chris is responsible for leading qualitative research on Asia-Pacific fund managers (excluding China, Hong Kong & Singapore) and their funds.

Chris first joined the Manager Research Team at Morningstar in 2006, and was jointly responsible for the Australia/New Zealand team from 2009-2014. He then relocated to Chicago as the Americas Leader for Morningstar's Managed Investment Data Group, before rejoining Manager Research for this role in October 2016. Before joining Morningstar in 2006, Chris worked in a variety of analyst roles, including as an analyst in the investment team at ASB Group Investments in Auckland, as an analyst in the Performance team at AllianceBernstein in London and as a fund manager assistant with F&C Asset Management's UK equities team. He started his career in 1999 at New Zealand Financial Planning.

He has a Bachelor of Commerce degree from Lincoln University, New Zealand.

Joshua Drake

Private Client Adviser & Head of Investment Strategies, Crosbie Wealth Management

Joshua Drake is a Private Client Adviser & Head of Investment Strategies at Crosbie Wealth Management, with offices in Newcastle, Sydney and the Gold Coast.

Josh is a member of the Financial Planning Association, the Australian CPA's and the Investment Management Consultants Association, holding the Certified Financial Planner and Certified Practising Accountant designations. In 2015 he became a member of the Beddoes Institute's 'Most Trusted Adviser' group.

As an authorised representative of Securitor Financial Group, Josh was named NSW Adviser of the Year in 2016, and is your NSW representative on the Professional Adviser Council.
Josh is married and a father to three boys.

Steve Farrell

National Manager, Advice Capability, BT Group Licensees

Steve's key accountabilities are the development and delivery of an innovative and best practice licensee offer, services and solutions, as well as lead the development and delivery of advice capability and enablement. Prior to joining BTGL, Steve held roles the broader BT Business, most recently in the Advice Offers team as a Product Manager, prior to which he held the position of Manager, Advice Documentation following two years as Senior Analyst within the same team.

Steve has a total of 10 years' experience within financial services, both in Australia and the United Kingdom, working in financial planning practices as a Senior Paraplanner and Analyst, and holds a Bachelor of Business (Financial Planning) from RMIT University. Steve is currently studying his Master of Business Administration (MBA) at RMIT University.

Adam Fleck

Regional Director of Equity Research, Australia and New Zealand, Morningstar

Adam is the regional director of equity research for Australia and New Zealand at Morningstar. He leads the firm's Sydney-based team of analysts focused on providing in-depth, fundamental equity research on Australian and New Zealand stocks based on sustainable competitive advantages and long-term valuation analysis.

Before assuming his current role, Adam was director of North American consumer equity research for Morningstar, covering beverage and tobacco companies, and associate director of equity analysis, covering heavy equipment and other industrial companies. He joined Morningstar in 2006.

Adam holds a bachelor's degree in business administration from the University of Notre Dame, where he graduated cum laude. He also holds the Chartered Financial Analyst® designation.

Karen Giuliani

Head of Marketing, BT Financial Group

Karen Giuliani is the Head of Marketing for BT Financial Group and is responsible for leading the marketing strategy across advice, super, investments and insurance. Over a career spanning more than 18 years in Financial Services, 12 of which have been with the Westpac Group, Karen has held a number of leadership roles across Marketing, Communications, Change Management and Customer Experience.

Karen's personal and career objective is to be continually inspired and challenged to make a difference to the well-being of Australians. Whether that be to help them with important financial decisions or to help them discover something they aren't aware of, to make a difference to their life.

Josh Hall

Investment Specialist, Aberdeen

Josh is an Investment Specialist in Aberdeen's Australian business. In this role Josh works closely with the offshore equity and multi-asset teams to ensure local investors remain informed of Aberdeen's current views and positioning. Josh has more than 17 years experience in the local financial services industry covering roles that include; product design and development, project management, investment research and client relationship management. The focus of Josh's career in recent years has been on designing advice and investment product solutions for the retirement market.

Josh has previously held roles at: AMP Capital, S&P, Challenger, Perpetual, Count and PricewaterhouseCoopers. He holds a Bachelor of Commerce (Economics) and a Masters of Applied Finance and Investment.

Phillipa Healy

Head of Marketing, PIMCO

Ms. Healy is a vice president in the Sydney office and head of marketing for Australia and New Zealand. Prior to joining PIMCO in 2015, she was head of marketing and client strategy at Centric Wealth in Sydney. She has also held positions at Investec Bank, Kaplan Funds Management and Patrick Corporation. She has 14 years of investment and financial services experience and holds a bachelor of business administration degree from Southern Cross University. Ms. Healy is a member of the Australian committee for PIMCO's Women's Leadership Network.

Chris Hill

Principal, Hill Legal

Chris Hill has been a practicing Lawyer for over 25 years and a Financial Adviser for over 20 years. He is accredited specialist by the Law Institute of Victoria, a Certified Financial Adviser and an Accredited Self Managed Super Fund Specialist Advisor by the SMSF Association, the pinnacle body in Australia for Self Managed Super Fund professionals. Chris is an Aged Care Specialist Adviser (ACSA) a member of the Law Institute of Victoria, the Financial Planning Association of Australia and the Society of Trust and Estate Practitioners (STEP), a worldwide professional association for practitioners dealing with family inheritance and succession planning. He is also a former member of the American Chamber of Commerce (AMCHAM).

Chris practices exclusively in the areas of Estate Planning, Self Managed Super Fund structuring and advice, Asset structuring and Business Succession Planning and Aged Care advice. His experience as both a Lawyer and Financial Adviser provides unique insight and the ability to adopt a strategic approach in delivering legal solutions to his clients.

Chris holds regular speaking engagements, educational workshops and guest radio spots, presenting on a wide range of both legal and financial topics. Chris is the Managing Director of "Hill Legal" and "Life Solutions, Financial Advisers" which both focus on providing holistic tailored legal and financial and legal solutions to clients at different stages of their life. Chris holds other non professional associations and sits on the board of various charitable and philanthropic organisations.

Chris is an avid adventurer and has climbed Mountain Peaks in Nepal and New Zealand and enjoys offshore racing, sailing and bike riding.

Scott Hoger
Technical Account Manager, TAL

Scott Hoger is a Technical Account Manager with TAL who has over fifteen years of industry experience in both the financial planning and insurance fields. Beginning his professional career at a young age, Scott built a sound knowledge base as a Financial Adviser and Business Development Manager for a number of banking institutions and insurance companies in and around Brisbane, QLD.

In 2011 Scott founded his own financial planning business with his wife specialising in personal and business insurance. For over three years he provided his retail clients with cutting edge, personal and business insurance advice.

Scott made a move to Melbourne to join TAL. His primary responsibility is providing strategic risk advice to financial advisors and licensees.

Richard Jones
Director & Principal, Wellbeing Matters

Richard’s corporate career includes senior executive positions with iconic brands such as British Petroleum (BP) (5 years), the UK’s largest corporate entity, and Royal Worcester Spode (5 years).
In 2002 Richard and his family relocated from the UK to Australia to pursue a much needed change in lifestyle balance. Following 18 months of training and mentorship at The Corporate Excellence Group, an Australian executive coaching and training company, Richard formed his own coaching and leadership development entity, ‘Wellbeing Matters’, at the end of 2005.

Wellbeing Matters is a growing business, coaching executives ranging from CEOs, GMs and senior managers of ASX listed companies and professional services companies, as well as the Owners/MDs of SMEs.

Richard’s coaching is focused on delivering outcomes for both the individual and their business. Richard places particular emphasis on creating self-awareness, unlocking potential, goal setting and strategic planning, communication skills development, leadership skills development, organizational and cultural change and utilizing team dynamics.

Andrew Lowe
Head of Technical Services, Challenger

Andrew has more than 20 years' technical experience including technical roles with AMP, ING, ANZ and Suncorp. He is a member of a number of industry working groups and regularly liaises with Government across his areas of specialisation.

Andrew's areas of expertise include pre and post retirement planning, superannuation (including SMSFs), life insurance and the regulatory environment for the provision of financial advice.

Andrew has a Master of Commerce, a Diploma of Financial Planning and is completing a law degree.

Matt Manning
Technical Consultant, BT Financial Group

Matt Manning is a member of the BT Advice Technical team. He has 16 years of experience in the financial services industry including the last 13 years in a technical services role, and the last 7 years with BT Financial Group. His qualifications include an undergrad degree in Commerce majoring in economics, and a postgraduate Masters of Taxation.

Michael Maughan
Portfolio Manager, Nikko AM

Michael joined the business in 2007. He has 18 years' experience in the stockbroking and funds management industry.

After training and qualifying as a chartered accountant he moved to London, initially as a research analyst with BNP Paribas and then as an analyst and portfolio manager with Gartmore Investment Management. Michael co-manages the Nikko AM Australian Share Income Fund.

He has analyst responsibilities for the Media, Telecommunication Services and Transportation/Logistics sectors.

Gordon McNaught

Technical Services Manager, Asteron Life

Gordon McNaught is a Technical Services Manager for Asteron Life and Suncorp Life.
Gordon initially began his career as a Futures Trader, becoming one of the youngest Senior Traders in history. From here he moved into financial services, where he has worked as a compliance officer, paraplanner and planner specialising in SMSF and Business Insurance.

From planning, Gordon moved into life insurance with BT Financial Group as a Strategic Sales Manager, Senior Business Development Manager, and a Risk Practice Development Manager. Prior to arriving at Asteron Life, Gordon was a Practice Development Manager for a boutique AFSL.

Gordon holds an Advanced Diploma of Financial Planning.

Gordon is committed to unlocking new ways of thinking for his advisers in both technical and relational areas. Gordon's insightful and humorous delivery sees his seminars as being considered to be both entertaining and highly educational.

Melissa Munting

National Manager Advice Technology, BT Financial Group

Melissa is responsible for the design and delivery of market leading Advice technology solutions and support services for BT Group Licensees. With over 20 years' experience in Financial Services, across two continents Melissa has a strong history of delivering customer centric solutions that improve both productivity and bottom line performance.
Previous to her current role Melissa spent a number of years with MLC Wealth Management developing a financial services offer for the UK market.

Melissa leads a team of high calibre individuals who are focused on providing quality solutions and support services to practices within the network as well as being responsible for the transition of practices from AdviserNETgain to Xplan.

Dale Pereira

Investment Specialist, BT Investment Management

Dale joined BT Investment Management in 2011 as Portfolio Specialist with responsibility for fixed interest and alternative strategies. He is a key link between BTIM's fixed interest team and the broader business and is responsible for providing information and insight to key internal and external stakeholders on BTIM's fixed interest capabilities. He also looks after our key intermediary research relationships.

Prior to joining BTIM, Dale held various senior research roles working closely with Advisers on providing product and strategy solutions for their clients, including Head of Product Solutions at Macquarie Private Wealth, and before that Research Strategy Manager at ING dealer groups.

Joshua Persky
Vice President, Model Portfolios & Solutions, BlackRock

Joshua Persky, Vice President, Model Portfolios & Solutions, is responsible for promoting the use of iShares by delivering insight across a broad range of investment disciplines including security valuation, market structure, trading and execution, portfolio analysis and construction. Josh joined BlackRock in June 2015, where he was most recently at MSCI (RiskMetrics) in New York, where he was a senior consultant for hedge fund analytics & sales. Prior to leaving Australia for the US, he held senior roles in relationship management within the MSCI index & Barra business, helping pension funds & asset managers with ETF construction, performance attribution & risk management analytics.

Elise Sanders
Regional Manager, AIA

Elise Sanders is the Regional Manager for SA/NT & WA and is based in our Adelaide office. Since starting with AIA Australia in 1998 she has worked in various departments including Policy Administration and Agency Services, she has taken on such roles as Sales Support, BDM and was also the State Manager for VIC/TAS.

During this time Elise has witness dramatic changes in the insurance industry. Technology has fostered a more corporate approach and products have been become more refined and strategic. The highlight for Elise, however, is working with advisers and helping them attend to clients' diverse needs.

Adviser's ability to adapt to changes and challenges is a source of inspiration for Elise as is the value they place on strong relationships with their partners and clients. Elise credits advisers for her professional development by involving her in client strategies and drawing on new ideas she creates to enhance their practices. Acting as a sounding board, business coach, strategist, or a product education are roles that Elise embraces when speaking with advisers.

David Simon
Principal Adviser,
Intergral Private Wealth

David has extensive experience in wealth management including almost 15 years with the Westpac Group where he operated one of the largest practices within the Westpac Private Bank and in 2015 Integral Private Wealth was established. David is a multiple national award winner both as an individual and business practitioner.

These awards include recognition as the National Senior Financial Planner of the Year (2009, 2010, 2012 and 2013), National Partnership Business of the Year (2013), National Community Spirit Award (2014) and the National Rising Star of the Year (2016).

David has a Bachelor of Commerce with a major in Economics, and is a CFP. He regularly features in publications such as the Australian Financial Review, the Sydney Morning Herald, The Age and The Australian.

Dean Stewart

Investment Specialist, Fixed Income and Currency Division, Macquarie

Dean is an Executive Director of Macquarie Investment Management's Fixed Income and Currency team and heads the Research team, looking after investment research and process development. Dean also has managerial oversight of the Rates and Currency team.

As Head of Fixed Income and Currency Research, Dean has authored a number of research papers including “Investing in Corporate Debt Securities”, “Liquidity and the changing nature of Australian cash funds”; and “Pricing and Investing in Collateralised Debt Obligations”. Prior to this, Dean was the Portfolio Manager for our enhanced fixed income funds, with responsibility for portfolio construction across all fixed income funds, and was responsible for trading duration in our credit enhanced cash funds.

Dean holds a Masters in Economics from Macquarie University and is a fellow of the Actuaries Institute.

Charles Stodart

Investment Specialist, Zurich Investments

Charles has worked in the financial services industry for over 18 years and joined Zurich Investments in 2015. He is responsible for providing support and investment commentary to financial advisers and investors of Zurich’s managed funds. Most recently, Charles was an Investment Analyst at Five Oceans Asset Management, covering Asian equities and global telecom stocks. Prior to this, he was a Fund Manager for Pengana Capital’s Asian Equities Fund, with additional responsibility for the Telecom and Technology sectors across Asia including Japan.

Charles has also held investment roles at Perennial Investment Partners and Murray Johnstone in Glasgow, covering global equities.

Charles has a Masters in Modern History from St Andrews University in the UK and is a CFA charterholder.

Mathew Sturge

Financial Adviser, Kiwi Assist Financial Services Ltd

Mathew has over 15 years’ experience in sales, management and training in the financial service industry in New Zealand and Australia. He currently runs his own firm named Kiwi Assist Financial Services and works concurrently as a trainer and mentor to new advisers undertaking their New Zealand qualifications.

Mathew has a passion for both training and mentoring new advisers to help them achieve their potential. His knowledge and experience, combined with his lively sense of humour, provides a training experience that ensures advisers learn the practical and theoretical skills they need and are engaged every step of the way.