Netwealth

ACCELERATE SUMMIT

17 September 2026, Melbourne

AGENDA

	DISCOVER STAGE	ACCELERATE STAGE	INNOVATE STAGE
8:00am	REGISTRATION & EXHIBITION HALL		
9:15am	**ACCELERATING FUTURES WITH NETWEALTH** Matt Heine		
10:15am	**FROM AI HYPE TO HUMAN SYSTEMS: DESIGNING THE ADVISER OPERATING MODEL OF THE FUTURE** Dom Price		
10:45am	MORNING TEA		
11:15am	**SUPERANNUATION: WHO WINS THE RETIREMENT RELATIONSHIP?** Aleks Vickovich, Daniel Choo, Mandy Mannix & more	**THE TRUST STACK** Michael Kollo, Courtney Blackman, Silvio Giorgio & Michelle Flanagan	LIGHTNING TALKS **BEYOND ACCESS: MAKING PRIVATE MARKETS WORK IN REAL ADVICE BUSINESSES WITH ICAPITAL** Mark Oliver **WHAT'S YOUR BRAND REALLY SIGNALLING TO CLIENTS?** Rob Chivers
12:05pm	**ENGAGING THE EMERGING AFFLUENT** Brett Joffe, Eve Hupert & Elissa Mathews	TO BE REVEALED	**UNLOCKING THE POWER OF YOUR DATA: AI-DRIVEN PRODUCTIVITY FOR ADVISERS** Manasi Priya & Marc Dudok
12:45pm	LUNCH		
1:30pm	**SELL, STAY OR SCALE? M&A DEALS & SUCCESSION PATHWAYS FOR CURRENT & NEXT-GEN OWNERS** Jamie Melville, Paul Barrett & more to be revealed	**PRIVATE EQUITY UNLOCKED: INSIGHTS FOR THE NEXT DECADE WITH J.P. MORGAN ASSET MANAGEMENT** Ashmi Mehrotra	**BUILDING THE NEW SOA WORKFLOW USING AI, LIVE WITH PARADINO** Alex Gassner & Josh Ratnarajah
2:20pm	**DESIGNING A PRACTICE THAT SERVES & REPRESENTS WOMEN** Seri Renkin & Lillian Kline	**BETTER, NOT BIGGER - REFRAMING GROWTH FOR ADVICE BUSINESSES** Sharon McClafferty	**PITCH FEST – EXPLORE EMERGING ADVICETECH** 3Lines Platform, Briefcase & more
3:00pm	AFTERNOON TEA		
3:30pm	**WHEN TECHNOLOGY MEETS THE PRACTITIONER: ENABLING TRUST AT SCALE** Sam Kothari & Dr Stephen Lu		
4:00pm	**BUILDING A BILLION DOLLAR BUSINESS** Adam Schwab, Carolyn Cresswell & Matt Heine		
5:00pm	NETWORKING DRINKS		

v1 Agenda is subject to change and will be updated as session details are finalised

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	BEST PRACTICE STUDIO 1	BEST PRACTICE STUDIO 2	BOARDROOM
7:15am			**THE FUTURE OF ADVICE OWNERSHIP ROUNDTABLE** Hosted by Global X
8:00am	REGISTRATION & EXHIBITION HALL		
10:45am	MORNING TEA		
11:15am	**REVIEW-READY REPORTING WITH CUSTOMISABLE TEMPLATES** Kevin Jin	**A PROACTIVE APPROACH IN MANAGING CLIENT ACCOUNTS** Evander Jackson	
12:05pm	**THE DAILY HABITS OF A WELL-RUN PRACTICE** Martyna Limanowska	**MOVING MONEY MADE EASY** Natasha Matipira	
12:45pm	LUNCH		
1:30pm	**A PROACTIVE APPROACH IN MANAGING CLIENT ACCOUNTS** Evander Jackson	**REVIEW-READY REPORTING WITH CUSTOMISABLE TEMPLATES** Kevin Jin	
2:20pm	**MOVING MONEY MADE EASY** Natasha Matipira	**THE DAILY HABITS OF A WELL-RUN PRACTICE** Martyna Limanowska	**THE MODERN FAMILY ADVISORY: WINNING, SERVING & RETAINING MULTI-GENERATIONAL CLIENTS** Scott Fitzpatrick
3:00pm	AFTERNOON TEA		
5:00pm	NETWORKING DRINKS		

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SESSIONS

ACCELERATING FUTURES WITH NETWEALTH Matt Heine	Matt Heine outlines the future of the Netwealth platform and the benefits to advisers, admin staff and clients.	9:15am	***ACCELERATE STAGE***
FROM AI HYPE TO HUMAN SYSTEMS: DESIGNING THE ADVISER OPERATING MODEL OF THE FUTURE Dom Price	As AI hype gives way to hard questions about impact. This session reframes innovation through the Human Operating System of an advice business. Drawing on real experiences with teams navigating constant change, Dom Price, former Atlassian Work Futurist, explores why productivity gains at the individual level rarely translate into better client outcomes, and how advisers can redesign workflows, ownership and partnerships so that technology truly enhances human capability. Attendees will leave with practical lenses to decide where AI belongs in their operating model, and where human judgment must remain front and centre.	10:15am	***ACCELERATE STAGE***
SUPERANNUATION. WHO WINS THE RETIREMENT RELATIONSHIP? Aleks Vichovich, Daniel Choo, Mandy Mannix & more to revealed	More information coming soon.	11:15am	***DISCOVER STAGE***
THE TRUST STACK Michael Kollo, Courtney Blackman, Silvio Giorgio & Michelle Flanagan	AI is moving from experimentation to daily workflow in advice practices, but client trust remains your license to operate. This session uses the lens of "the trust stack": the layers of data protection, process design, and human accountability that need to hold firm as AI takes on more of the advice workflow. Our panel will explore a framework for deciding where AI belongs, where it doesn't, and how to keep clients' trust intact as the tools get more powerful.	11:15am	***ACCELERATE STAGE***
LIGHTNING TALK 1 ***BEYOND ACCESS: MAKING PRIVATE MARKETS WORK IN YOUR ADVICE BUSINESS WITH ICAPITAL*** Mark Oliver	The case for private markets is well established. Advisers understand the potential benefits, and client demand continues to grow. The challenge now is moving from access to implementation. Join Mark Oliver as he shares insights into how advice firms are integrating private market investments into client portfolios at scale. He will discuss the practical considerations shaping portfolio construction, manager selection, operational workflows, liquidity management, and ongoing client engagement. This session will examine the trade-offs and opportunities advisers face as alternative investments become a more significant component of portfolio strategy, and highlight how leading firms are building repeatable, scalable approaches that deliver both adviser and client outcomes.	11:15am	***INNOVATE STAGE***
LIGHTNING TALK 2 ***WHAT'S YOUR BRAND REALLY SIGNALLING TO CLIENTS?*** Rob Chivers	Before a prospective client meets an adviser, they have already begun forming expectations based on the firm's language, imagery and communications. Brand identity specialist Rob Chivers, founder and creative director of Now Next, explores how advice firms can make their value more visible, coherent and memorable, without pursuing difference for its own sake or discarding the signals that already work.	11:35am	***INNOVATE STAGE***
ENGAGING THE EMERGING AFFLUENT Brett Joffe, Eve Hupert & Elissa Mathews	Win the next generation of clients before the wealth transfer happens. In this session, Flux co-founder Brett Joffe joins family office director Eve Hupert to reveal how emerging affluent Australians really engage with money, who they trust, and why advisers are increasingly competing with new channels. Walk away with data backed strategies and practical content plays to earn attention, build trust early, and turn high potential prospects into long term relationships.	12:05pm	***DISCOVER STAGE***

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UNLOCKING THE POWER OF YOUR DATA: AI-DRIVEN PRODUCTIVITY FOR ADVISERS Manasi Priya & Marc Dudok	The true value of AI comes from connecting it to the information your business relies on every day. Discover how Microsoft Copilot and Cowork can securely harness your firm's knowledge, documents, client information and workflows, alongside the Netwealth ecosystem, to help advisers find answers faster, generate insights, prepare for client interactions and execute tasks more efficiently. Learn how AI can turn your existing data into a competitive advantage.	12:05pm	***INNOVATE STAGE***
SELL, STAY OR SCALE? M&A DEALS AND SUCCESSION PATHWAYS FOR CURRENT AND NEXT-GEN OWNERS Jamie Melville, Paul Barrett & more to be revealed	More information coming soon.	1:30pm	***DISCOVER STAGE***
PRIVATE EQUITY UNLOCKED: INSIGHTS FOR THE NEXT DECADE WITH J.P. MORGAN ASSET MANAGEMENT Ashmi Mehrotra	Ashmi's session is designed to share insights about how private equity (PE) can be accessed, how different parts of the PE ecosystem behave, and what practical due diligence questions matter most: especially around liquidity, fees, risks, and portfolio construction. The session will consider the different parts of the small-mid market and the various types of investment opportunities from primary, secondary to co-invest. Advisers will gain a clear understanding of PE's broader opportunity set compared to public markets and why manager dispersion and sourcing selectivity can be important in outcomes.	1:30pm	***ACCELERATE STAGE***
BUILDING THE NEW SOA WORKFLOW USING AI, LIVE WITH PARADINO Alex Gassner & Josh Ratnarajah	Too much of an advice team's time goes into chasing information, checking what is ready and keeping work moving. It slows advice delivery, limits capacity and pulls skilled people away from clients. In this live build, Alex and Josh from Paradino will take a client from their initial meeting to a review-ready SoA and client presentation. They will show how the workflow runs in practice: where AI can do more of the work, when it needs to stop, and where the advice team's judgement needs to remain in place.	1:30pm	***INNOVATE STAGE***
DESIGNING A PRACTICE THAT SERVES & REPRESENTS WOMEN Seri Renkin & Lillian Kline	This roundtable is a practical, research-grounded session for women advisers and for firms committed to elevating their service to female clients. You'll explore the critical shift from Wealth IQ (technical literacy) to Wealth EQ (emotional and relational intelligence) and how unconscious bias still shapes advice, engagement and retention. Expect concrete language shifts, meeting design tips and trust-building strategies that help your practice genuinely reflect, support and empower women, as clients, decision-makers and advisers while strengthening outcomes for every client you serve.	2:20pm	***DISCOVER STAGE***
BETTER, NOT BIGGER - REFRAMING GROWTH FOR ADVICE BUSINESSES Sharon McClafferty	Discover why the highest-performing advice firms focus on getting better before they focus on getting bigger. Using real financial advice case studies, Sharon will take attendees inside the commercial improvement projects that have transformed firms: from repricing and client segmentation to capacity, profitability and value creation. Many of these businesses experienced extraordinary organic growth as a result, but not because growth was the goal. Growth became the outcome of building a better business.	2:20pm	***ACCELERATE STAGE***
PITCH FEST – EXPLORE EMERGING ADVICETECH 3Lines Platform, Briefcase & more	Join us for a rapid-fire session with some of Netwealth's tech partners. This is the ultimate elevator pitch session: fast, focused, and full of ideas to future-proof your advice business. More information about the partners joining the pitch to follow.	2:20pm	***INNOVATE STAGE***

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REVIEW-READY REPORTING WITH CUSTOMISABLE TEMPLATES Kevin Jin	Not all clients want the same information, so why deliver the same report? Netwealth's new customisable reporting tools make it easier to create reusable templates tailored to different client segments, preferences and review needs. In this practical session, you'll learn how to build and customise reports at scale, streamline client review preparation, and deliver a more personalised reporting experience that focuses on what matters most to each client.	11:15am / 1:30pm	***BEST PRACTICE STUDIOS***
A PROACTIVE APPROACH IN MANAGING CLIENT ACCOUNTS Evander Jackson	What if you could stay one step ahead of your clients' needs? In this practical, TRM-led session, learn how to proactively manage client accounts, maintain data quality and uncover opportunities across your client base. We'll explore the tools, insights and processes that can help you identify issues early, stay on top of administration requirements and keep client accounts on track.	11:15am / 1:30pm	***BEST PRACTICE STUDIOS***
THE DAILY HABITS OF A WELL-RUN PRACTICE Martyna Limanowska	The best-run practices don't leave their day to chance. Learn how to create a proactive daily workflow that helps you stay organised, focus on what matters most and stay one step ahead. From identifying actions that require attention and managing client documents to staying informed with market and industry insights, you'll discover practical ways to reduce administration, improve visibility across your client base and feel prepared for what's next.	12:05pm / 2:20pm	***BEST PRACTICE STUDIOS***
MOVING MONEY MADE EASY Natasha Matipira	From funding accounts and consolidating assets to pension refreshes and withdrawals, moving money is a key part of managing client portfolios. This practical session will help you confidently navigate common transfer scenarios, understand the most effective ways to move money, and avoid the pitfalls that can create delays. Through real-world examples, you'll learn how to streamline transfer processes, improve efficiency and reduce unnecessary rework across your practice.	12:05pm / 2:20pm	***BEST PRACTICE STUDIOS***
WHEN TECHNOLOGY MEETS THE PRACTITIONER: ENABLING TRUST AT SCALE Sam Kothari & Dr Stephen Lu	In high trust industries, real disruption happens when technology doesn't replace practitioners but amplifies them. Hear from a clinician and tech founder who teamed up to rethink preventative healthcare. They discuss how their unique partnership helped unlock an industry shaping innovation at scale and without eroding client trust.	3:30pm	***ACCELERATE STAGE***
BUILDING A BILLION-DOLLAR BUSINESS Adam Schwab, Carolyn Cresswell & Matt Heine	Join Matt Heine and two exceptional founders who have created incredible businesses worth billions. During this fireside chat they will share their insights into how to scale a business and the lessons they have learnt. Learn how the two different entrepreneurs achieved what most deem unachievable. Matt Heine will lead Carolyn and Adam in a candid, fireside chat that is not to be missed.	4:00pm	***ACCELERATE STAGE***

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BOARDROOM

EXCLUSIVE TO THE BOARDROOM		
THE FUTURE OF ADVICE OWNERSHIP ROUNDTABLE Hosted by Global X	More information coming soon. This session is by invitation only.	***7:15–8:45AM***
THE MODERN FAMILY ADVISORY: WINNING, SERVING & RETAINING MULTI-GENERATIONAL CLIENTS Scott Fitzpatrick	Today's significant individuals and families need more than technical expertise, they need trusted advisers who can navigate the human side of wealth, succession and decision-making. Scott Fitzpatrick explores the rise of the Modern Family Advisory: an approach that combines technical excellence with leadership, advocacy and family governance to move the client experience from transactional to transformational. Drawing on current case studies, this session offers practical frameworks and fresh insights for strengthening client relationships, differentiating your practice, and preparing for the greatest intergenerational wealth transfer in history.	***2:20PM***

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