

Netwealth
ACCELERATE⁷
SUMMIT

4 September 2025, from 8am
Centrepiece, Melbourne

**SUPERAGENCY –
A GLIMPSE INTO AN
AI FUTURE YOU CAN
USE TODAY**

Dawid Naude
CEO & Founder,
Pathfindr



**BUILDING A BILLION-
DOLLAR BUSINESS**

Tania Austin
Founder,
DECJUBA

Andrew Pridham
Co-founder,
MA Financial Group

Plus, hear what matters to you:

**FOR ADVISERS/
INVESTMENT
DECISION MAKERS**

- ▶ Unlocking private markets
- ▶ Creating loyalty that lasts
- ▶ Adviser automation & AI
- ▶ High-net-worth advice
- ▶ Pitch-Fest: rapid fire tech

[+ more](#)

**FOR BUSINESS
LEADERS &
ENTREPRENEURS**

- ▶ Trust & next-gen clients
- ▶ Exploring growth capital
- ▶ Crafting business plans
- ▶ Branding with PowerPoint
- ▶ Brain, biology & environment

[+ more](#)

**FOR THE PRACTICE
'ENGINE-ROOM'**

- ▶ Connecting data to insights
- ▶ Engaging clients with the app
- ▶ Reporting & templating
- ▶ Implementing new tech well
- ▶ Enhancing efficiency

[+ more](#)

v5 Agenda is subject to change and will be updated as session details are finalised

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AGENDA

	DISCOVER STAGE	ACCELERATE STAGE	INNOVATE STAGE	BEST PRACTICE STUDIO
8:00am	REGISTRATION & EXHIBITION HALL			
9:15am	ACCELERATING FUTURES WITH NETWEALTH Matt Heine			
10:00am	SUPERAGENCY – A GLIMPSE INTO AN AI FUTURE YOU CAN USE TODAY David Naude			
11:00am	MORNING TEA			
11:30am	OPTIMISING YOUR BRAIN, BIOLOGY & BUILT ENVIRONMENT Hannah Conkey	EXPLORING GROWTH CAPITAL WITH MERCHANT, AZ NGA & BROADLEAF David Haintz, Paul Barrett & Dean Gilkison	CREATING LOYALTY THAT LASTS: NETWEALTH'S ADVISABLE AUSTRALIAN RESEARCH Rebecca Wokes	HOW TO ENGAGE YOUR CLIENTS USING NETWEALTH'S PORTAL & MOBILE APP Zarah O'Neill
12:20pm	UNLOCKING PRIVATE MARKETS Marco Bizzozero, Mark Carlile & Stephen Nesbitt	NEXT-GEN NOW: WINNING THE TRUST OF TOMORROW'S CLIENTS Justin Joffe & Brett Joffe	GROWTH UNLOCKED: AI, AUTOMATION & SOCIAL MEDIA IN ACTION Michelle Flanagan, James Wrigley & Racheal Collogan	A STEP-BY-STEP GUIDE TO EFFECTIVE CLIENT REPORTING & POWERFUL TEMPLATING Kelly Hanlon
1:00pm	LUNCH			
2:00pm	PITCH-FEST ON PRIVATE MARKETS: THREE STRATEGIES THAT MATTER TODAY JP Morgan Asset Management, BlackRock & Betashares	UNLOCK THE SECRETS TO CRAFTING ACTIONABLE BUSINESS PLANS Jarther Taylor	PITCH-FEST: RAPID FIRE TECH DEMOS Otivo, Intelliflo, Live Preso & CBOE	NETWEALTH FEATURES THAT ENHANCE EFFICIENCY & GIVE YOU BACK TIME TO FOCUS ON CLIENTS Kaleb Dunchue
2:50pm	MODERN HNW STRATEGIES: INSIGHTS FROM KODA, VIOLA PRIVATE WEALTH & EIKON FINANCIAL SERVICES Farren Williams, Charlie Viola & Katerina Nicolakopoulos	HOW NOT TO BLOW UP YOUR BUSINESS FROM POOR TECH IMPLEMENTATION Danni Le Grande & Peter Worn	FROM FAMILIAR TO EXCEPTIONAL: BRANDING WITH EVERYDAY SOFTWARE Kylie Gould	HANDS-ON WITH UNIFY: CONNECTING DATA TO REAL-TIME INSIGHTS Adam Sadler & Sarah Gritt
3:30pm	AFTERNOON TEA			
4:00pm	BUILDING A BILLION-DOLLAR BUSINESS Andrew Pridham, Tania Austin & Matt Heine			
5:00pm	NETWORKING DRINKS			

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<p>ACCELERATING FUTURES WITH NETWEALTH</p> <p>Matt Heine</p>	<p>Matt Heine outlines the future of the Netwealth platform and the benefits to advisers, admin staff and clients.</p>	<p>9:15am</p>	<p>ACCELERATE STAGE</p>
<p>SUPERAGENCY – A GLIMPSE INTO AN AI FUTURE YOU CAN USE TODAY</p> <p>Dawid Naude</p>	<p>AI isn't coming, it's already reshaping how financial advice is delivered, decisions are made, and client relationships are built. In this fast-paced keynote, Dawid Naude will demonstrate how AI is far more than an optimiser of your status quo - it's a pathway to entirely new service models, revenue streams and customer experiences. With plenty of live demos and real-world use cases, Dawid will show how leading advisers and firms are harnessing AI for unparalleled multiplier effects across people, process and technologies. Walk away with practical insights to unlock productivity, insight, and growth.</p>	<p>10:00am</p>	<p>ACCELERATE STAGE</p>
<p>OPTIMISING YOUR BRAIN, BIOLOGY & BUILT ENVIRONMENT</p> <p>Hannah Conkey</p>	<p>What if your greatest edge isn't just skill or experience but your brain, your biology, and the spaces you work in? In this session, neuroscience and performance strategist Hannah Conkey unpacks the science of how we think, feel and perform, as well as what that means for the way we lead, advise, make decisions, and show up every day.</p>	<p>11:30am</p>	<p>DISCOVER STAGE</p>
<p>EXPLORING GROWTH CAPITAL WITH MERCHANT, AZ NGA & BROADLEAF</p> <p>David Haintz, Paul Barrett & Dean Gilkison</p>	<p>With more capital flowing into advice than ever before, how do you choose the right partner, or know if you need one at all? Hear from three experienced capital providers as they unpack the opportunities, trade-offs and truths behind growth funding, succession, and strategic investment. Whether you're scaling up, stepping back, or just curious, this session will challenge assumptions and help you think differently about the future of your business.</p>	<p>11:30am</p>	<p>ACCELERATE STAGE</p>
<p>CREATING LOYALTY THAT LASTS: NETWEALTH'S ADVISABLE AUSTRALIAN RESEARCH</p> <p>Rebecca Wokes</p>	<p>In a world where client expectations are constantly evolving, how can advisers build loyalty that truly lasts? This keynote session unpacks Netwealth's latest research into the behavioural drivers of client retention. Discover the 12 value drivers that matter most: and how they shift across the client lifecycle. Learn how to anticipate client needs, personalise your service, and deliver value that goes beyond investment returns.</p>	<p>11:30am</p>	<p>INNOVATE STAGE</p>
<p>HOW TO ENGAGE YOUR CLIENTS USING NETWEALTH'S PORTAL & MOBILE APP</p> <p>Zarah O'Neill</p>	<p>In today's digital-first world, client engagement doesn't stop at advice, it extends to how clients interact with their investments. Netwealth's client portal and mobile app are designed to make that experience seamless, intuitive, and impactful. In this session you will learn practical strategies to onboard clients, explain login and usage, and identify key moments across the client lifecycle where the app adds value.</p>	<p>11:30am</p>	<p>BEST PRACTICE STUDIO</p>
<p>UNLOCKING PRIVATE MARKETS</p> <p>Marco Bizzozero, Mark Carlile & Stephen Nesbitt</p>	<p>Private markets, once limited to large institutions, are now seeing increased access and growing investor interest. This surge brings both opportunities and challenges, such as lower liquidity, extended timelines, and varying information quality, making areas like due diligence and client communication more complex. This presentation provides practical tools for advice firms who want to enter private markets, covering current opportunities, insights and guidance in navigating this evolving sector.</p>	<p>12:20pm</p>	<p>DISCOVER STAGE</p>

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SESSIONS

NEXT-GEN NOW: WINNING THE TRUST OF TOMORROW'S CLIENTS Justin Joffe & Brett Joffe	How do you build lasting relationships with Millennials and Gen Z, clients who value trust, transparency and digital first experiences? In this session, Flux co-founders Justin and Brett Joffe share practical strategies to engage the next generation through gamification, micro interactions and scalable technology while keeping the human touch that sets advice apart. Walk away with actionable ideas to future proof your business and strengthen client loyalty for years to come.	12:20pm	ACCELERATE STAGE
GROWTH UNLOCKED: AI, AUTOMATION & SOCIAL MEDIA IN ACTION Michelle Flanagan, James Wrigley & Racheal Collogan	Technology usage is a perennial topic, and with new tools like AI it will remain at the forefront of business leaders' minds. In this session we will talk to two practitioners who are using technology for business growth and operational efficiency. Learn how to leverage Facebook and Instagram to drive growth, and how you can leverage technologies like Calendly and Filnote.ai (an AI toolkit) to better convert leads into clients and onboard clients efficiently.	12:20pm	INNOVATE STAGE
A STEP-BY-STEP GUIDE TO EFFECTIVE CLIENT REPORTING & POWERFUL TEMPLATING Kelly Hanlon	With reporting demands on the rise, particularly from Emerging Affluents who seek frequent, sophisticated portfolio reports, often weekly or monthly, many advice practices are finding it difficult to keep up. Legacy processes are often time-consuming, making it challenging to deliver reports at scale. This masterclass provides a practical, step-by-step guide to help advisers streamline their reporting using Netwealth's reporting suite, enabling them to meet client expectations with greater efficiency and impact.	12:20pm	BEST PRACTICE STUDIO
PITCH-FEST ON PRIVATE MARKETS: THREE STRATEGIES THAT MATTER TODAY JP Morgan Asset Management, BlackRock & Betashares <i>Please note this session is intended for advisers with wholesale clients.</i>	Get ready for a high-energy, rapid-fire session where leading fund managers pitch their most compelling private market strategies. From private equity and venture capital to corporate lending and diversified credit, this curated showcase will spotlight innovative approaches to generating yield, managing risk, and accessing opportunities beyond traditional markets. Whether you're seeking diversification, downside protection, or investor-friendly structures, this session will arm you with fresh ideas to accelerate your investment offering.	2:00pm	DISCOVER STAGE
UNLOCK THE SECRETS TO CRAFTING ACTIONABLE BUSINESS PLANS Jarther Taylor	For many financial advice professionals, the idea of stepping away from client work to focus on business planning can feel like a luxury – or even a distraction. But what if dedicating just 24 hours to strategic planning could accelerate your business development by up to three years? Or perhaps you are among the four out of five businesses that lack a clear growth strategy? Whether your goals include enhancing business sophistication, expanding your client base, developing your team, or advancing your personal growth journey, this session offers practical frameworks that you can implement right away.	2:00pm	ACCELERATE STAGE
PITCH-FEST: RAPID FIRE TECH DEMOS Otivo, Intelliflo, Live Preso & CBOE	Join us for a rapid-fire session with some of Netwealth's tech partners. In this curated session, Otivo, Intelliflo, LivePreso, and CBOE will pitch how their tech can enhance digital advice delivery, streamline practice operations, automate client reporting, and even unlock new investment opportunities. It's the ultimate elevator pitch session: fast, focused, and full of ideas to future-proof your advice business.	2:00pm	INNOVATE STAGE

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NETWEALTH FEATURES THAT ENHANCE EFFICIENCY & GIVE YOU BACK TIME TO FOCUS ON CLIENTS Kaleb Dunchue	Time is precious, and this session is all about getting more of it back. Learn practical tips and tricks from real-life use cases that show how Netwealth's tools can automate workflows, from time-critical client requests to everyday admin. Discover how to reduce manual work, improve accuracy, and deliver a smoother client experience, all while scaling your advice business.	2:00pm	BEST PRACTICE STUDIO
MODERN HNW STRATEGIES: INSIGHTS FROM KODA, VIOLA PRIVATE WEALTH & EIKON FINANCIAL SERVICES Farren Williams, Charlie Viola & Katerina Nicolakopoulos	This session explores the evolving landscape of high-net-worth advice, highlighting innovative strategies, service models, and technology trends that are redefining how advisers attract, engage, and retain HNW clients. Drawing on real-world insights from leading practitioners, the session will showcase practical approaches to delivering differentiated value, building enduring client relationships, and navigating the complexities of modern wealth management.	2:50pm	DISCOVER STAGE
HOW NOT TO BLOW UP YOUR BUSINESS FROM POOR TECH IMPLEMENTATION Danni Le Grande & Peter Worn	As technology keeps changing, knowing how to pick and manage the right tools is essential for the adviser of the future. This session dives into the nitty-gritty of technology implementation in financial advisory practices, with a spotlight on operational resilience and smart decision-making. Attendees will hear from real-world case studies that showcase common missteps in tech deployments, like the fallout from poor software choices and what leads to implementation hiccups. We'll also take a closer look at the gap between vendor demos and real-world performance, offering valuable insights into the human and cultural factors that can make or break tech rollouts – insights that are crucial for practice leaders and operations teams.	2:50pm	ACCELERATE STAGE
FROM FAMILIAR TO EXCEPTIONAL: BRANDING WITH EVERYDAY SOFTWARE Kylie Gould	In an industry built on trust, how you show up visually matters. This session from Creatik explores how financial advisers can use familiar software, like PowerPoint, to strengthen brand perception, improve client engagement, and future-proof their business. Learn how visual consistency builds credibility, how accessible design supports aging clients, and how simple design strategies can make your materials more impactful. With practical examples and ready-to-use frameworks, this session empowers advisers to simplify their design approach and stand out: without needing new tools or a design background.	2:50pm	INNOVATE STAGE
HANDS-ON WITH UNIFY: CONNECTING DATA TO REAL-TIME INSIGHTS Adam Sadler & Sarah Gritt	Advice is getting harder to deliver: more systems, more data, and rising client expectations. This session shows how Unify brings it all together, consolidating data from across your tech stack to solve everyday challenges, like sourcing data for client reviews, managing software overload, strategic planning, and fixing data discrepancies. See how advice firms are using Unify's aggregation tools and reporting dashboards to reduce admin, scale efficiently, and free up time to focus on what matters most: clients.	2:50pm	BEST PRACTICE STUDIO
BUILDING A BILLION-DOLLAR BUSINESS Andrew Pridham, Tania Austin & 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 Tania and Andrew in a candid, fireside chat that is not to be missed.	4:00pm	ACCELERATE STAGE