

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 & Crystal Hanna	THE TRUST STACK Dr. 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	AI: BEYOND THE OBVIOUS WINNERS FIVE KEY THEMES SHAPING THE WORLD Cathie Wood (USA)	LIVE BUILD 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, Laurel Moulynox, Nathan Jacobsen & Simon Mason	PRIVATE EQUITY UNLOCKED: INSIGHTS FOR THE NEXT DECADE WITH J.P. MORGAN ASSET MANAGEMENT Ashmi Mehrotra (USA)	LIVE BUILD THE NEW SOA WORKFLOW USING AI WITH PARADINO Alex Gassner & Josh Ratnarajah
2:20pm	DESIGNING A PRACTICE THAT SERVES & REPRESENTS WOMEN Seri Renkin OAM & Lillian Kline	BETTER, NOT BIGGER - REFRAMING GROWTH FOR ADVICE BUSINESSES Sharon McClafferty	PITCH FEST – EXPLORE EMERGING ADVICETECH 3Lines Platform, Briefcase & StroPro
3:00pm	AFTERNOON TEA		
3:30pm	WHEN TECHNOLOGY MEETS THE PRACTITIONER: ENABLING TRUST AT SCALE Sam Kothari & Dr Stephen Lu		
4:10pm	BUILDING A BILLION DOLLAR BUSINESS Adam Schwab, Carolyn Cresswell OAM & Matt Heine		
5:00pm	NETWORKING DRINKS		

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

AGENDA

**BEST PRACTICE
STUDIO 1**

**BEST PRACTICE
STUDIO 2**

BOARDROOM

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**

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**REVIEW-READY REPORTING WITH
CUSTOMISABLE TEMPLATES**

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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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ACCELERATING FUTURES WITH NETWEALTH Matt Heine, Netwealth	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, Be Luminous	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? Mandy Mannix, Challenger Daniel Choo, Betashares Aleks Vickovich, Conexus Crystal Hanna, Netwealth	Who earns the retirement relationship as super funds, advisers, platforms and retirement specialists converge? Aleks Vickovich leads a cross-sector conversation on the changing needs of retirement clients, the adviser's role in guiding complex decisions and the capabilities that matter most, from retirement income and investment choice to service, reporting, technology and trust. Leave with practical questions to test and strengthen your own retirement proposition.	11:15am	DISCOVER STAGE
THE TRUST STACK Dr. Michael Kollo, Qualitas Courtney Blackman, Women in Emerging Tech Australia Silvio Giorgio, Netwealth Michelle Flanagan, The Wealth Designers	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, iCapital	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, Now Next Brands	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, Flux Eve Hupert, Family Office & Hupert Family Foundation Elissa Mathews, Netwealth	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

**AI: BEYOND THE OBVIOUS
WINNERS FIVE KEY THEMES
SHAPING THE WORLD**

Cathie Wood (USA), ARK Invest

AI is emerging as one of the most powerful technology platforms in history, but its impact extends far beyond AI itself. ARK's Cathie Wood will explore how AI is driving a "Great Acceleration" across the innovation landscape, shaping the next wave of investment opportunities for advisers: from the AI infrastructure and applications powering intelligence to robotics, energy storage scaling autonomous technologies, blockchain infrastructure enabling agentic commerce, and AI-driven breakthroughs in healthcare. The session will examine how the convergence of these technologies could unlock trillions in economic value across the innovation ecosystem.

12:05pm

**ACCELERATE
STAGE**

**LIVE BUILD
UNLOCKING THE POWER
OF YOUR DATA: AI-DRIVEN
PRODUCTIVITY FOR ADVISERS**

Manasi Priya, Microsoft
Marc Dudok, Microsoft

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, Merchant
Laurel Moulynox, Morrows
Nathan Jacobsen, AZ NGA
Simon Mason, Netwealth

Most firms eventually face the question: Sell, Stay or Scale? The real answer isn't linear. Featuring AZ NGA, Merchant and Morrows Advisory this session unpacks the actual choices on the table: full sale, minority equity partnerships, or internal succession pathways that build long-term value while keeping control. Expect a genuine debate between very different capital models.

1:30pm

**DISCOVER
STAGE**

**PRIVATE EQUITY UNLOCKED:
INSIGHTS FOR THE NEXT
DECADE WITH J.P. MORGAN
ASSET MANAGEMENT**

Ashmi Mehrotra (USA), J.P. Morgan
Asset Management

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**

**LIVE BUILD
THE NEW SOA WORKFLOW
USING AI WITH PARADINO**

Alex Gassner, Paradino
Josh Ratnarajah, Paradino

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 OAM, The Dea Network
Lillian Kline, The Dea Network

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, Slipstream Group	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 & StroPro	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
REVIEW-READY REPORTING WITH CUSTOMISABLE TEMPLATES Kevin Jin, Netwealth	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 STUDIO 2 BEST PRACTICE STUDIO 1
A PROACTIVE APPROACH IN MANAGING CLIENT ACCOUNTS Evander Jackson, Netwealth	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 STUDIO 2 BEST PRACTICE STUDIO 1
THE DAILY HABITS OF A WELL-RUN PRACTICE Martyna Limanowska, Netwealth	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 STUDIO 2 BEST PRACTICE STUDIO 1
MOVING MONEY MADE EASY Natasha Matipira, Netwealth	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 STUDIO 2 BEST PRACTICE STUDIO 1
WHEN TECHNOLOGY MEETS THE PRACTITIONER: ENABLING TRUST AT SCALE Sam Kothari, Everlab Dr Stephen Lu, Everlab	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, Luxury Escapes Carolyn Cresswell OAM, Carmen's Kitchen Matt Heine, Netwealth	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.	4:10pm	ACCELERATE STAGE

EXCLUSIVE TO THE BOARDROOM

**THE MODERN FAMILY
ADVISORY: WINNING,
SERVING & RETAINING
MULTI-GENERATIONAL
CLIENTS**

Scott Fitzpatrick, The Significant
Advice Network

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
–4:00PM**

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