

09:00am - 10:00am
THE DEEP BLUE SEA: REGULATION AND THE FUTURE OF FINANCIAL ADVICE



Appointed the inaugural Chief Economist for ASIC in 2007, Alex Erskine helped lead some rethinking of the role of securities regulation as Australia began to work through the global financial crisis. His post-ASIC consulting projects include a paper on regulating the Australian Financial System, which fed into the considerations of the Murray Financial System Inquiry. Drawing on his experience at the highest levels,

Mr Erskine will open the conference with a unique and insightful overview of the road ahead. This exclusive keynote presentation covers:

- A unique perspective on the Murray Inquiry and regulatory changes
- Key macro and micro economic themes and their significance to your business
- A glimpse into the policy decision-making of the Abbott government

and its financial services policy agenda in 2015

- A vision for the future of financial services, the Australian economy and the role of technology within it

Speaker: Alex Erskine, Managing Director and Founder, Erskinomics Consulting

10:00am - 10:30am
Part 1: FSI in Practice - PRODUCT DEVELOPMENT

- Taking products to market: regulatory issues facing fund structuring, digital disclosure and investment management arrangements, investment distribution, platform operators and dealer groups
- Updates on legal cases and regulatory orders affecting product manufacturing and distribution, including codes of conduct and obligation

Speaker: Jon Ireland, Partner, Henry Davis York

10:30am - 11:00am
Part 2: FSI in Practice - PRODUCT DISTRIBUTION

- Regulatory issues affecting intermediaries and consumers
- Using MDAs and ASIC's approach to managed accounts
- Bypassing traditional MIS using platforms as a vehicle

Speaker: Claire Wivell Plater, Managing Director, The Fold Legal

11:00am - 11:30am
Coffee break and networking

11:30am - 12:15pm
Platforms - 2020 and beyond

- Global trends in the wealth management platforms and how they are influencing the Australian market
- How will social changes and developments in technology disrupt the current shape of the industry
- What might Platforms look like, both in 2020 and beyond

Speaker: Darren Stevens, Director of Product Management and Strategy, Bravura

12:15pm - 1:00pm
PANEL: GRABBING THE BIGGEST BITE OF MARKET SHARE

- How the institutional providers are keeping abreast of start-up developments and adapting to change
- Latest thinking in platform development

and pricing strategy

- Perspective on how regulation is affecting the major players and the impact of the Financial System Inquiry

Moderator: Tim Stewart, Editor, *InvestorDaily*, Sterling Publishing

- Panellists:**
- Kathy Vincent, General Manager of Retail Wealth Platform, MLC Limited
 - Peter Labrie, Head of FirstWrap and Investment Product, Colonial First State
 - Matt Heine, Joint Managing Director, netwealth
 - Ian Dunbar, CEO and founder, FinDigital

1:00pm - 2:00pm
LUNCH AND NETWORKING

2:00pm - 3:00pm
PANEL: AT THE HELM - WHAT DEALER HEADS WANT

- Licensee bosses share their top technology and advice provision priorities

- What do Australian financial advisers want from their product providers?
- The opportunities in property and SMSF administration
- Adapting to regulatory/technological change and achieving dealer profits in a fee-for-service environment

Moderator: Tim Stewart, Editor, *InvestorDaily*, Sterling Publishing

- Panellists:**
- Giulio Russo, General Manager, Madison Financial Group
 - Wes Hall, Chief Operating Officer, BT Adviser Services
 - TBC
 - TBC

3:00pm - 3:30pm
Coffee break and networking

followed by an up-close interview with Kelly Powers of BT Financial Group, to further provide a unique perspective on the impending Fintech boom and how Australian big businesses should start thinking small.

Keynote speaker: Steve Baxter, entrepreneur, investor and 'Shark' on Shark Tank

9:15am - 10:15am
KEYNOTE: IMPROVISE, ADAPT, OVERCOME



Paul speaks from the heart about beating the odds through the combination of physical strength, mental toughness and the sheer will to live. "It's not a shark story," he says, "it's a story about overcoming adversity, embracing change, embracing challenges."

From childhood delinquent and drug dealer to Snoop Dogg's back-up rappers to elite navy diver and author of *No Time for Fear*, he is now determined to carve out the best future for himself he could possibly imagine, inspiring other to beat life's setbacks.

Improvise... Adapt... Overcome... has become Paul's mantra - his powerful takeaway message reveals the importance of how to overcome any circumstance by leaving nothing to chance.

Keynote speaker: Paul de Gelder, motivational speaker, navy diver and author of *No Time for Fear*

10:15am - 10:45am
Coffee break and networking

10:45am - 11:30am
Diving into the Dealer Group Market

- Overview and update on the dealer group market: winners and losers in the post-FOFA environment
- Where dealer groups have shifted in the past 12 months
- Dealer group and licensee outlook: distribution focus strategy

Speaker: Steve Prendeville, Managing Director, Forte Asset Solutions

11:30am - 12:15pm
PANEL: DISTRIBUTION SUCCESS IN A CROWDED OCEAN

- Expert marketing and product distribution strategies
- Business development in the age of

- savvy consumer focus
- Adapting to changes in dealer group market/activity

Moderator: Vanessa Bennett, CEO, Inside 80 performance - Australia

- Panellist:**
- Simone Newman, Head of Marketing and Distribution, APN Property Group
 - Wes Gillett, Head of Marketing and Distribution, HUB24
 - Anne Fusch, National Manager, Retail Distribution and Advice, Sunsuper
 - TBC

12:15pm - 1:15pm
LUNCH AND CONFERENCE CLOSE

Social Events



MASTERFUNDS INVITATIONAL
Wednesday 26 August 2015
 A much-anticipated part of the Masterfunds Conference is the annual golf day, and the 2015 event will not disappoint! The golf is included in your ticket price; however, places are strictly limited. Please ensure you register overleaf to play.



MASTERFUNDS FOOD & WINE FESTIVAL
Wednesday 26 August 2015
 Join us at the official conference welcome where you will be treated to fine wine and food from some of Australia's best known and loved wineries.



GALA DINNER
Thursday 27 August 2015
 Relax and unwind at the annual Masterfunds Gala Dinner where you will be treated to delicious food and wine and great entertainment