

	DISCOVER STAGE	ACCELERATE STAGE	INNOVATE STAGE
8:00am	REGISTRATION & EXPO HALL (INNOVATION ZONES)		
9:15am		Accelerating futures: a welcome and roadmap MATT HEINE	
10:00am		Building a business that can adapt to change: The Adaptability Quotient FUTURE CRUNCH	
11:00am	MORNING TEA & EXPO HALL (INNOVATION ZONES)		
11:30am	Innovation in pricing – what we can learn from others ROB JONES	How to hire the best people and use culture to keep them SHANYN PAYNE, JUSTIN ANGSUWAT	Maximise your treasure-trove of client data to improve back-office efficiency and client satisfaction CLINTON HATCHER, PARIS BISLEY, KATERINA NICOLAKOPOULOS
12:20pm	Understanding private markets vs. public markets with iCapital MARCO BIZZOZERO	Free up time to do more advising – how to innovate your operating model with outsourcing NATHAN JACOBSEN	Level up your marketing – get Canva working for your business DONNA MORITZ
1:00pm	LUNCH & EXPO HALL (INNOVATION ZONES)		
2:00pm	Income opportunities for wholesale investors NATHAN LIM, DANIELLE PRESS, SAM RITER	AdviceTech 2024: Building a culture to maximise digital transformation GENEVIEVE FROST	Pitch-fest: demos of emerging tech BRIEFCASE, PRODUCT REX, ENSOMBL, XEPPPO
2:50pm	Supporting a client's transition from business owner to wealth owner FIONA HINDMARSH	AI for today, not tomorrow – how advice firms are using generative AI and other tools DEAN HOLMES, DAVID HANUS	Win more clients by communicating your value: a behavioural science lens NIKKI DAHLGREN
3:30pm	AFTERNOON TEA & EXPO HALL (INNOVATION ZONES)		
4:00pm		Building a billion-dollar business ALEX ZACCARIA, ALEX VYNOKUR	Bring your own device and create one month of content in one hour on Canva DONNA MORITZ
5:00pm		CLOSING REMARKS	
5:15pm	NETWORKING DRINKS: BROUGHT TO YOU BY ICAPITAL		

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<p>INNOVATION ZONES</p>	<p>Whether you want to enhance business efficiency, portfolio construction, streamline your operations, or gain valuable insights and education for your staff and clients, the innovation zones will have something for you. The zones are for engaging, questioning, and being part of the conversation that drives our industry forward.</p>
<p>Accelerating futures: a welcome and roadmap MATT HEINE</p>	<p>Matt Heine outlines the future of the Netwealth platform and the benefits to advisers, admin staff and clients.</p>
<p>Building a business that can adapt to change: The Adaptability Quotient FUTURE CRUNCH</p>	<p>What is today's key quality for individuals and organisations that wish to thrive in a world of constant change? In this session, Future Crunch provides the answer. The next decade belongs to those who are willing to adopt new ways of thinking - people with a high AQ, or 'Adaptability Quotient' – one's ability to thrive in unpredictable environments.</p>
<p>Innovation in pricing – what we can learn from others ROB JONES – PELETON PARTNERS</p>	<p>Join Rob Jones as he takes a scientific approach to the art of pricing your advice. With insights from adjacent industries and several detailed case studies, this session explores the latest in advice pricing innovation and reviews both the characteristics and opportunities for emerging, developing, and even mature firms.</p>
<p>How to hire the best people and use culture to keep them with Netwealth and Culture Amp's Chief People Offices SHANYN PAYNE – NETWEALTH, JUSTIN ANGSUWAT – CULTURE AMP</p>	<p>In this session, you'll hear from two highly skilled People and Culture leaders to discuss the intricacies of effective talent acquisition and retention, especially in a market where candidates are scarce. Learn how deliberate culture-building can be a cornerstone for retaining valuable team members and the role of technology in fostering engagement and connection within the workforce.</p>
<p>Maximise your treasure-trove of client data to improve back-office efficiency and client satisfaction CLINTON HATCHER, PARIS BISLEY, KATERINA NICOLAKOPOULOS</p>	<p>This session will explore practical scenarios where you can leverage client data from external systems using APIs, data integrations and feeds. We will discuss this with two advice firms who have been leveraging client data to improve back-office and advice workflows, and to improve client satisfaction with data.</p>
<p>Understanding private markets vs. public markets MARCO BIZZOZERO – ICAPITAL</p>	<p>Join Marco, Head of International at iCapital and Executive Committee member, as he shares insights on the key trends that highlight the strategic importance of private markets. With 30 years of experience in wealth management and private equity, Marco has held senior positions at UniCredit, Deutsche Bank, and UBS. Don't miss this opportunity to learn from a global industry leader.</p>
<p>Free up time to do more advising – how to innovate your operating model with outsourcing NATHAN JACOBSEN – VBP</p>	<p>This session will provide a practical walkthrough of how advice firms are achieving success by doing more of what they are good at. Attendees will learn about the importance of building nimble business models, effective outsourcing strategies, and the future of the outsourcing market.</p>
<p>Level up your marketing – get Canva working for your business DONNA MORITZ – CANVA VERIFIED EXPERT</p>	<p>Learn how to scale your marketing efforts quickly and easily - even as a non-designer. In this session with a Canva verified expert, you'll discover what's possible with Canva as a solopreneur or small team. Get ready to elevate your marketing and online presence with amazing on-brand visual content.</p>

<p>Income opportunities for wholesale investors NATHAN LIM – LONSEC, DANIELLE PRESS – IAM, SAM RITER – BLACKROCK</p>	<p>Tailored for advisers with wholesale clients, this expert panel brings together top voices from BlackRock, IAM, and Lonsec to explore sophisticated income opportunities. Delve into the latest developments in private credit, uncover the strategic role of bonds in client portfolios, and navigate the implications of market and regulatory changes. It is designed to equip you with actionable insights to enhance your client offerings and capitalise on emerging income trends.</p>
<p>AdviceTech 2024: Building a culture to maximise digital transformation GENEVIEVE FROST – NETWEALTH</p>	<p>In this presentation, we draw on the experiences of a group of financial advice firms, AdviceTech Stars, who have embraced digital transformation, and do it well. You will learn how to shift your culture, leadership model and mindset, capital allocation and change management processes to supercharge your digital transformation efforts thanks to Netwealth's latest AdviceTech research.</p>
<p>Pitch-fest: demos of emerging tech BRIEFCASE, PRODUCT REX, ENSOMBL, XEPP0</p>	<p>Join us for a rapid-fire session with some of Netwealth's tech partners. This curated showcase will feature tech that streamlines the advice process, improves staff education, boosts client engagement & data capabilities, and can optimise investment efficiency. Featuring Briefcase, Product Rex, Ensombl and Xeppo, this session will be the ultimate elevator pitch for you to see the latest in tech innovation.</p>
<p>Supporting a client's transition from business owner to wealth owner FIONA HINDMARSH – SIGNIFICANT VC</p>	<p>Fiona Hindmarsh could have written the book on becoming a trusted whole-of-family adviser. Her background of 3 decades in investment, and family office wealth management is underscored by roles such as COO of ANZ Investment Bank and Head of Client Engagement for the Myer Family Company. Don't miss this opportunity to learn how to assist clients in their transition from business ownership to wealth ownership.</p>
<p>AI for today, not tomorrow – how advice firms are using generative AI and other tools DEAN HOLMES – THE WEALTH NETWORK, DAVID HANUS – BLUEROCK</p>	<p>AI is THE hot topic at the moment, but for many it is still media hype or just the "next shiny toy". In this session we will talk to two practitioners who have experienced AI first-hand in advice practices. They will provide you with AI actions you can do today (not tomorrow) which can impact efficiency, client service and even sales.</p>
<p>Win more clients by communicating your value: a behavioural science lens NIKKI DAHLGREN – THE LAB</p>	<p>The terms 'value perceptions' or 'value for money' often present a conceptual haze—vague and ambiguous at best. Merely believing that services are 'good value for money' seldom translates directly into decisive action. In this presentation, we draw on the latest Behavioural Science 'value for money' concepts, and our latest Advisable Australian research to provides you a roadmap for shifting prospects into committed clients.</p>
<p>Building a billion-dollar business ALEX ZACCARIA – LINKTREE, ALEX VYNOKUR – BETASHARES</p>	<p>Join Matt Heine and two exceptional founders who have created incredible businesses worth more than a billion-dollars. 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 the two Alexs', in a candid, fireside style chat not to be missed.</p>
<p>Bring your own device and create one month of content in one hour on Canva DONNA MORITZ – CANVA VERIFIED EXPERT</p>	<p>In this workshop, you'll be rolling up your sleeves and creating a month's worth of visual content with Canva... in an hour! Bring your laptop and learn to create content quickly and easily. At the end of this session, you'll also walk away with an exclusive collection of custom templates from one of Canva's top template Creators!</p>