

SPEAKERS

Thursday 21 March 2019, Sydney



Yolanda Beattie, Director, Yo&Co

Yolanda Beattie is the founder and director of Yo & Co, a boutique consultancy that helps organisations create more open, adaptive and connected workplaces through compelling ideas, important conversations and learning experiences.

She has been at the forefront of the diversity agenda in Australia for the past six years having spent three years leading the public affairs department at the Workplace Gender Equality Agency and most recently as Mercer's practice leader for diversity and inclusion.

She leads the Future IM/Pact project, which brings together 14 super funds and fund managers to promote a career in investment management to diverse talent pools with an initial focus on attracting more women into investment roles.



The Hon. Chris Bowen MP, Shadow Treasurer

Chris Bowen entered Parliament in 2004 and has held a wide range of portfolios including serving as Treasurer, Minister for Human Services, Minister for Immigration, Minister for Financial Services, Assistant Treasurer, Minister for Competition Policy, Minister for Small Business and Minister for Tertiary Education. Chris has been responsible for a range of significant policy reform programs in these portfolios.

He served as Interim Leader of the Labor Party and Acting Leader of the Opposition following the 2013 Federal election and has been Shadow Treasurer since 2013. Chris has also served as Shadow Minister for Small Business since 2018.

Chris is served on Fairfield Council for nine years is a former Mayor and President of the Western Sydney Councils (WSROC).

He has a Bachelor of Economics, a Masters in International Relations and a Graduate Diploma in Modern Languages (Bahasa Indonesia).



Wally Brill, Head of Conversation Design Advocacy & Education, Google (USA)

Wally helps Google's partners develop and maintain best practices of conversation design for the Google Assistant. Previously as Google's Senior Persona Designer he helped bring the character of The Google Assistant to life. Prior to coming to Google, he designed persona driven, speech recognition systems for enterprises and governments from Allstate Insurance and British Airways to eBay and The U.S. Navy. Wally studied electronic music composition at The New School for Social Research.



Frank Cooper, Global Chief Marketing Officer, BlackRock (USA)

As Global CMO, Mr. Cooper is responsible for shaping BlackRock's global brand and marketing strategy, including digital marketing, branding and research and insights functions at the firm. Mr. Cooper previously served as Chief Marketing and Creative Officer at BuzzFeed, the leading social content publisher. Prior to this, he served as Chief Marketing Officer of Global Consumer Engagement for PepsiCo's Global Beverage Group. Mr. Cooper started his career as an entertainment lawyer and later served as a senior executive at two of the most iconic music labels: Motown and Def Jam. Mr. Cooper's work spans television, digital, short-form video, feature film, sports and music.

Mr. Cooper has been acknowledged by Fast Company magazine as one of the "100 Most Creative People in Business," was a four time recipient of Billboard magazine's "Power 100" and recipient of AdColor's coveted "Legend" award. Mr. Cooper earned a J.D. from Harvard Law School, where he served as the Supreme Court Editor of The Harvard Law Review, and a B.S. degree in business administration from the University of California at Berkeley.



Jacqui Cooper, Winter Olympian

La Trobe Financial's Company Ambassador – Jacqui Cooper has represented Australia in the sport of Aerial Skiing for 20 years. Her career started in 1989 at Mt Buller when she was recruited by Geoff Lipshut (CEO of the OWIA) to join the Techne Team. Within three years she was already representing her country at the World Championships in Lake Placid New York; by 1994 she competed at the Lillehammer Winter Olympics. In 1999, just ten years after starting her sport she became a World Champion; the next ten years would see her dominate and revolutionise her sport.

In a very long and decorated career she has competed in 139 World Cup Events, nine World Championships and been selected to five Winter Olympic Teams. When Jacqui competed in Vancouver in February 2010 she became the first Australian woman in history (summer or winter Olympics) to represent Australia at five Games.

Her record five world titles, 39 World Cup medals, 24 World Cup wins and three major World Championship medals has left Jacqui as the greatest Aerial skier of all time (man or woman); an achievement that will go unbeaten for decades.

Her sport is unforgiving; she has had knee, elbow, shoulder and hip reconstructions. In 2001 she broke her back in an attempt to win a record 3rd World Title; she went on and won it. In 2002 at the Salt Lake City Winter Olympics she injured her knee and broke her leg just two days before the Olympic competition ending years of dreaming, willing and wanting.

In 2010, Jacqui competed in Vancouver after a year of intense hip and knee rehabilitation; she shocked doctors and surgeons by her will, inner strength and courage to make a brave attempt to be competitive at those games. She spent most of the months leading into the Olympics in a wheel chair, learning to walk again, and gaining confidence in a sport that is brutal and cruel. She stunned her rivals, coaches, and team mates when she came fifth; her best Olympic result in the 20 years.

In between training and competing in events Jacqui devotes much of her time to various Sporting Committees around the world making sure she can be a voice for her peers at a National and International level. Over two decades she has spent time on the Australian Olympic Committee (AOC) Board, the AOC Athlete's Commission (Deputy Chair), Ski and Snowboard Australia Board, the Australian Institute of Sport Athletes Commission, the International Ski Federation (FIS) Athletes Committee, the FIS Freestyle Athletes Committee, the World Anti-Doping Agency (WADA) Athlete's Committee and the WADA education committee.



Vicki Doyle, Chief Executive Officer, Rest

Vicki joined Rest as CEO in May 2018, bringing more than 17 years' senior executive leadership experience in superannuation, life insurance, wealth management and banking.

Vicki is passionate about simplifying and de-mystifying superannuation to help all Australians achieve their best retirement outcomes. She is excited about the next stages of Rest's journey as a market-leading fund, and is determined to continue the delivery of outstanding member benefits.

Vicki holds an Executive MBA from Australian Graduation School of Management and Diploma Australian Institute of Company Directors and has been an Executive Director on Trustee Boards. Vicki has also worked closely with Australian regulators APRA and ASIC in the capacity of the Responsible Manager for various Licenses and has experience influencing Government Public Policy through working closely with industry bodies such as ASFA.



Dr Martin Fahy, Chief Executive Officer, ASFA

Dr Martin Fahy is Chief Executive Officer of the Association of Superannuation Funds of Australia (ASFA).

Martin joined ASFA in November 2016 and was previously a Partner in management consultancy at KPMG, where he worked with clients across the financial services and other sectors to drive transformational change.

Martin has worked in a consulting and advisory capacity in the US, Europe, the Middle East and Africa and Asia Pacific. He is a recognized thought leader in the field of Shared Services, Business Process Outsourcing (BPO) and Finance Transformation. He has presented at more than 500 industry and academic conferences and has published five books, three monographs and numerous articles.

From 2007 to 2011, Martin was CEO at the Financial Services Institute of Australasia (FINSIA) where he led the organisation's transformation post the sale of its education business. Prior to FINSIA, he led strategy and development for the Chartered Institute of Management Accountants (CIMA) in Asia Pacific.

Martin holds a Ph.D from the National University of Ireland, is a former senior Fulbright scholar and has extensive research and policy experience from his time as an academic. He is an Adjunct Professor at the University of Technology Sydney, where he is also Chair of the Centre for Management and Organisational Studies (CMOS) Advisory Board.



Simon Hicks, Cognitive Artificial Intelligence & Business Development Director, IPsoft

As Australian Superannuation runs in to head winds caused by a range of different issues and challenges the opportunity to deploy a digital workforce in response expands. Be it in a front-end customer facing role or a back-end process capacity, the potential for AI enabled technology to deliver efficiency, improve customer experience and interaction, and reduce overheads within the Australian Superannuation space is significant, real and achievable today.

IPsoft is a world leader in conversational AI, who make it possible to transform human interaction through the use of digital employees. Our virtual agents, virtual engineers and robots make what once was considered impossible a reality, augmenting the human workforce with intelligent systems that empower humans to be more human.

Simon is an AI convert who is passionate about the role that technology can play in changing the way humans live, work and communicate every day. Starting out his career in financial services in London, Simon moved to Australia in 2011 where his focus has been on digital solutions and technology. Simon started working in the field of AI in 2016 where he has developed a strong commercial understanding of how and where intelligent systems, robotics and AI enabled technology can be deployed.



Paul Howes, National Sector Leader – Asset & Wealth Management, KPMG

Paul is a Partner at KPMG Australia and is the National Sector leader for Asset & Wealth Management leading KPMG's work in the superannuation, funds management, private equity and wealth sectors across the firm. Paul joined KPMG in 2014 from the Australian labour movement where he had worked for the previous 15 years including 7 years as the leader of the nation's largest industrial union – The Australian Workers' Union.

Paul provides strong leadership which focusses on stakeholder and team engagement as he draws on his professional experience from his roles as the Deputy Chair and a Director of AustralianSuper (Australia's largest superannuation fund managing over \$110 billion on behalf of over 2.4 million members) between 2006 and 2014 and as a Director of numerous other Government and private organisations.

Paul is also a published author, columnist and has produced a number of thought leadership pieces in the areas of asset recycling, productivity enhancement and transforming the wealth management sector. In addition to his role leading KPMG's work in the Asset & Wealth Management sector Paul is also the Partner in Charge of KPMG's Customer, Brand and Marketing Advisory practice.



Ashton Jones, Head of Investments, Retirement and New Propositions, TAL

Ashton is TAL's Head of Investments, Retirement and New Propositions. In this role he leads TAL's \$4.5bn investments and superannuation business managing a team of 18 product and actuarial specialists. Ashton's team is focused on expanding TAL's protection proposition into new savings and retirement segments to realise TAL's vision of being Australia's leading diversified insurance provider. In 2018, Ashton was awarded the Financial Services Council (FSC) Young Leader of the Year Award and writes regularly on fintech, innovation and disruption in financial services.

Beyond this, Ashton is the Deputy President of the University of Sydney Business School Alumni Network and an Executive Committee Member of both the Association of Superannuation Funds of Australia (ASFA) and the FSC Emerging Leaders Networks. He is also actively involved across a number of committees and sub-committees at the FSC and ASFA focused on superannuation and retirement policy setting.



Georgina Lee, Innovation, Growth and Client Experience Leader, Mercer

Georgina Lee is Head of Innovation, Growth and Experience for Mercer's Career business in Australia. A member of the executive team, Georgina helps the business determine where, what, and how to innovate so that our clients can unlock the potential of a thriving workforce. Georgina is passionate about workplaces where individuals can achieve their sense of purpose and be empowered to take control of their careers and their financial wellbeing.

Prior to this role Georgina was based in London designing Mercer's Financial Wellbeing offering and before that led Mercer's Corporate Office in Australia/NZ partnering with the CEO, Ben Walsh, and the leadership team to deliver on our strategy. Together, she has 11 years' experience in professional services (specialising in superannuation) including consulting, product development, business development, strategy and operations. Combined with her varied background in engineering, the arts and entrepreneurial pursuits, she brings diverse perspectives and a unique combination of both left and right brain thinking. She's a strong advocate for promoting cognitive diversity as well as the visibility of gender and ethnic diversity in senior corporate roles.

Georgina holds a Bachelor of Mechanical Engineering (with Honours), a Bachelor of Commerce (Finance & Statistics) from Monash University, and a Graduate Diploma in Art History from the University of Melbourne. Georgina was the recipient of the 2016 Mavis Robertson Women In Super scholarship and is a member of the Association of Superannuation Funds Australia (ASFA) Emerging Leaders VIC Committee and the ASFA Conference Committee.



Ash Priest, Managing Partner, Novigi

Ash is an experienced executive level business strategist and technology consultant with a background in enterprise architecture and software engineering. He has worked across a number of industries including Financial Services, where he has held senior technology innovation roles. In these roles, he has consulted on platform architecture, data, integration and process automation with many of Australia's leading Super Funds and Banks. Since 2016, as Managing Partner at Novigi, Ash has been working with a range of clients to help them design and implement innovative data management and interoperability platforms that are now delivering substantial process efficiencies, providing insight through access to management data and enabling innovation.



Travis Schoenleber, Senior Managing Director, Cambridge Associates

Travis is a Senior Managing Director in Cambridge Associates' Sydney office. He has over 15 years investment experience gained working in the U.S., Australia, and New Zealand. Travis joined Cambridge in 2007, and prior to relocating to the Sydney office, he spent seven years in the firm's Boston office headquarters. Travis has worked as an advisor and portfolio manager for a wide variety of institutional investors in Australia, New Zealand, Canada, the United States and Bermuda.

Travis advises on investment and institution-specific issues such as asset allocation strategy, manager selection, investment program evaluation, and portfolio objectives and constraints. In addition, Travis specialises in constructing and overseeing direct hedge fund and other absolute-return portfolios for clients. He has been a speaker at industry conferences on topics such as investing in hedge funds, constructing and managing portfolios, and risk management from a practitioner's perspective.

Before joining Cambridge Associates in 2007, he was an equities analyst at a US\$20 billion pension, the Employee Retirement Systems of Texas. He was responsible for individual company research, attribution analysis, and, more specifically, the Asia Property portfolio. Travis also held a position as a portfolio manager with the MBA Investment Fund, LLC, where he managed three equity and fixed income portfolios. Travis also has two years of US fixed income and mortgage experience at Wells Fargo.



Paul Schroder, Group Executive, AustralianSuper

AustralianSuper is a Fund of 2.3 million members that manages \$148 Billion of member's assets and 285,000 contributing businesses.

Paul is AustralianSuper's Group Executive responsible for Strategy, Product, Brand and Reputation. He was responsible for the Fund's response to the Banking Royal Commission and its submissions to the recent Productivity Commission review of superannuation.

He was previously the National Secretary of the Finance Sector Union of Australia and is a Director of SuperFriend – the industry fund Mental Health Foundation.

Paul holds a Bachelor of Commerce (University of Melbourne) and was awarded the Shell exhibition prize for Labour economics. He also holds a Diploma in Financial Planning.



Simon Stefanoff, Director, Voice and Conversational AI, Deloitte Digital

Simon has been building innovative digital experiences for the world's leading brands for almost two decades. He started his career as a software engineer during the dotcom boom, and over the years has spent time in Technical Director roles across the UK in Australia. His focus in recent years has been around the emergence of conversation as an interface, with a particular interest in Voice. As part of Simon's role at Deloitte Digital he leads the Voice & Conversational AI practice, where he helps clients understand and make effective use of conversational technologies in creating the customer experiences of the future.



Darren Wickham, General Manager, Group Life Product and Pricing, Investments and Retirement Incomes, TAL

Darren Wickham is the General Manager - Group Life Product and Pricing, Investments and Retirement Incomes at TAL. He is also a trustee director of the Mercer Super Trust.

Darren has written a number of papers on superannuation, life insurance and employee benefits. In 2008 Darren was awarded Australian Actuary of the Year, which in 2019 makes him actuary of yesteryear.



Kylie Willment, Chief Investment Officer, Mercer

Kylie Willment is a Partner in Mercer's Institutional Wealth business and is Chief Investment Officer for the Pacific region. Kylie leads the Delegated Solutions (DS) portfolio management team which consists of asset allocation strategists, portfolio managers and analysts across Australia, New Zealand and Asia. The team is responsible for managing approximately A\$39 billion in assets within Mercer's Multi-Manager Funds. Kylie is a member of Mercer's Pacific Investment Committee; Mainstream Assets Global Investment Committee; the Institutional Wealth Leadership Team; and Co-Chair of the Global DS ESG Integration Committee. She is based in Sydney.

Prior to joining Mercer in October 2017, Kylie gained 27 years of experience in financial services including 14 years in investment management. Kylie joined Mercer from NSW Treasury Corporation (TCorp), the A\$90 billion state government investment agency. At TCorp, Kylie was responsible for managing over A\$30 billion within the TCorpIM Funds, for advising a number of large government clients on investment policy and strategy and for leading the development of TCorp's investment stewardship framework. Earlier in her career, Kylie worked for National Australia Bank in Brisbane and various investment banks in the United Kingdom.

Kylie holds a Masters of Applied Finance from Macquarie University, and is a Certified Investment Management Analyst (CIMA®). She is a Director of the CIMA Society of Australia, and a member of the Investment and Wealth Institute's global Certification Commission.