

SPEAKERS AND CHAIRS

Monday 25 February 2019, Sydney



Jenni Baxter, Executive General Manager – Insurance, Rice Warner

Jenni Baxter joined Rice Warner in 2014 bringing over 20 years' experience from the insurance industry across both the UK and Australian markets and now leads the Insurance and Fintech teams. Starting her career in the UK heading up pricing and valuation teams at Commercial Union and Legal & General, Jenni relocated to Australia and moved into a senior pricing role at MLC in 2007. During her time at MLC she developed key experience and knowledge across the Retail, Direct and Bancassurance businesses.

Since joining Rice Warner, Jenni has specialised her technical skills across the Group Insurance industry through activities including leading the inaugural Group Experience Claims Study, assisting Superannuation Funds with their insurance services and providing independent advice to Trustee Boards and Insurance Committees.

Jenni is passionate about developing high performing teams together with ensuring that work produced by the team is of the highest quality and meets individual client needs. Jenni is a Fellow of the Actuaries Institute in Australia (previously a Fellow of the Institute of Actuaries in the UK) and a Graduate of the Australian Institute of Company Directors.



Anne Clarke, Chief Risk Officer and Chief General Counsel, TAL

Anne Clarke was appointed Chief General Counsel in September 2015 and her role was expanded to include Chief Risk Officer in March 2017. She is responsible for the Office of Chief General Counsel and the Risk Office. These areas incorporate responsibility for Disputes and Litigation; Legal, Company Secretariat; Enterprise Risk Management; Compliance; Resilience and Security. Anne's role is to assist TAL achieve its business objectives within the regulatory and legal environment supported by an effective risk framework and broad strategic advice. Anne is also responsible for managing TAL's regulatory and government relationships.

Anne has over 25 years' experience in financial services, starting her legal career in the financial services practice at Mallesons Stephen Jacques (now King Wood Mallesons) and moving from private practice (Herbert Smith Freehills) to join AMP in 2014. During her time in private practice, Anne was named as a leading superannuation practitioner in Best Lawyers for a number of years.

Anne is highly regarded in the financial services industry for both her technical legal skills, and her ability to operate and communicate at senior executive, board and regulator levels. She has also earned a reputation for having a comprehensive knowledge of the commercial and industry framework.



Stacey Copas, author of *How To Be Resilient*

Stacey Copas has not let a devastating accident that left her a quadriplegic and dependent on a wheelchair at 12 years old slow her down.

Instead, she has used her life experience and personal philosophies to become Australia's leading keynote speaker and facilitator on resilience and finding the opportunity in change and adversity, delivering keynote speeches, training, consulting and coaching to organisations such as Telstra, Holden and CSIRO.

Her first book *How To Be Resilient*, which has been endorsed by Brian Tracy, Layne Beachley and Jack Delosa, was published in 2015. Stacey has been featured by Financial Review, ABC radio and The Australian for her insights on resilience in the workplace.

With a "say yes and figure out how later" approach to life, Stacey has achieved some remarkable feats including starring in a feature film with no acting experience, volunteering in Solomon Islands, competing at a national level in para-athletics after 22 years on the sidelines and running for parliament.

Stacey is an Ambassador and Mentor for the Layne Beachley Foundation Aim For The Stars and in her spare time you are likely to find Stacey in the nearest patch of sunshine with a book recharging her solar powers.



Andrew Gill, Managing Director, Pacific Life Re

Andrew is responsible for founding Pacific Life Re's Australian office, which has grown to over 70 staff since it was first established in 2015. Under his leadership, Pacific Life Re has successfully entered into the Australian group and retail markets, and has been successful in bringing UnderwriteMe to Australia, through a number of partnerships with local insurers.



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.



Sue Freeman, Senior Consultant, Finity Consultants and co-author of the Actuaries Institute Green Paper on Mental Health and Insurance

Sue Freeman is a Senior Consultant at Finity Consultants who has over 25 years' experience working in personal injury policy and practice. She has a background in psychology and rehabilitation, and has worked for providers, insurers and regulators. At Finity Consultants Sue's work has included strategic reviews of claims operations, claim leakage reviews; and benchmarking insurance claims and underwriting operations against best practice principles. Sue was co-author of the Green Paper on Mental Health and Insurance recently published by the Actuaries Institute and has a particular interest in improving the assessment and management of mental health claims.



Gerard Kerr, Head of Life Insurance – OnePath

Gerard Kerr has over 30 years experience in the financial services industry across underwriting, claims and product development. He travelled to Australia in 2001, following a successful insurance career in Ireland, the United Kingdom and the USA.

Prior to joining OnePath in 2008, Gerard was Head of Claims at Asteron. Today, as Head of Life Insurance, Gerard is responsible for insurance proposition across the Retail, Direct & Group Life businesses at OnePath.



Gerard is currently a member of the FSC Life Board, and was the founding Chair of Lifewise, FSC's working group on Australia's underinsurance gap.

When he is not at work, Gerard enjoys playing football (slowly now) as well as coaching, travelling and spending time with his wife Jennie and their four children.



Glen McCrea, Deputy CEO and Chief Policy Officer, ASFA

Glen McCrea is Deputy CEO at the Association of Superannuation Funds of Australia (ASFA) and leads the policy and research team. He is responsible for ensuring ASFA's advocacy is prioritised, supported by evidence-based policy and he drives ASFA's work around best practice.

Prior to ASFA, he worked for 15 years in policy at the Federal Treasury, including a secondment working as the senior tax adviser to the Assistant Treasurer. Glen specialises in economic, superannuation, tax, insurance and fiscal policy.

He has led stakeholder engagement for government on key Government reforms, has extensive experience in taxation law and is skilled in working with business, government and industry to effect legislative reform.



Glen holds a Bachelor of Economics (Hons), Bachelor of Commerce and a Master of Public Policy (Economic Policy) from the Australian National University.

Hugh Miller, Actuary and Principal, Taylor Fry

Hugh Miller is an actuary and principal at Taylor Fry, where he has worked as a consultant for over a decade. Much of his early experience was in traditional areas of general insurance. In recent years his focus has been data and analytics, including insurance, telecommunications and loyalty schemes. A large portion of his current work is done in the government social sector— projecting long term outcomes for people interacting with welfare programs, homelessness supports and child protection services. He has a PhD in statistics, and looks to apply new data-based techniques to current problems.



Lisa-Marie McKechnie, Partner, Mills Oakley

A partner in Mills Oakley's Sydney office, Lisa-Marie acts for a number of trustees and life insurers in all jurisdictions including the SCT, FOS, the District, County, Supreme and Federal courts. She also advises trustees on all aspects of their fund operations including deceased estate issues, life policies, indemnity insurance, disclosure and member reporting, outsourcing agreements, dealing with and advising on interventions and requisitions by Regulators and AFS licence and RSE licence obligations.

In the ever-changing regulatory environment, Lisa-Marie guides a number of trustees and employers through fund restructures and associated governance. She also acts for life insurers and financial planners in the areas of product advice, compliance, regulatory, group life, individual policy and investment complaints and disputes.

Chris Porter, Executive Manager Operations, MTAA Super

Chris Porter was Manager Administration and Operations at MTAA Super before being promoted to Executive Manager. He has over 35 years' experience in the superannuation industry and has held senior managerial positions in a range of organisations across both retail and not-for-profit funds.

Chris holds a Diploma in Superannuation Management and a Diploma in Life Insurance.

Stephanie Phillips, Chief Group Insurance Officer, AIA Australia

Stephanie has more than 20 years' experience in the Australian financial services industry, with management experience spanning operations, claims and underwriting, superannuation and distribution. Stephanie was appointed Chief Group Insurance Officer in September 2015. She originally joined AIA Australia in October 2009, and was appointed Head of Group Insurance in early 2010, playing a key role in developing and growing the company's Group Insurance business market share. In late 2011, Stephanie joined AIA's Regional head office in Hong Kong to take on the role of Director- Group Corporate Solutions, responsible for supporting and developing AIA's Group Insurance businesses across the region. After returning to Australia in early 2014 and consulting for a brief period, she returned to the AIA Australia team in September 2014 as Head of Group Operations and later Head of Group Distribution.

Chris Powell, Managing Director and CEO, Integrity Life

Chris Powell is the Managing Director and CEO of Integrity Life. He believes that customer-centricity is the future of the industry and together with a highly experienced team, is applying this approach to providing innovative new products and services at value for money prices. He thinks that when customer experiences are filled with doubt and frustration, it's a sign that there must be a better way of doing things.

As the Chief Executive Officer of Integrity Group, Chris has been instrumental in raising over \$180m of capital, obtaining licence approval to operate as a licensed life insurer and acquiring QBE Life.

He has a wealth of experience as a senior executive and director across financial services. He has worked across both retail and business banking, wealth management, investment management, life insurance and general insurance. He has worked in some of the most respected financial services businesses in Australia and across the world, including; NRMA, State Super Corporation, Commonwealth Bank, Zurich Insurance Group, Lonsec and Centric Wealth. Chris has also spent time in venture capital and IT software, with an emphasis on developing early stage businesses and he has a strong record delivering successful M&A transactions.