

## PROGRAM

Thursday 25 November, Sydney

### Welcome and opening address

#### Speakers:

- MC: Ashton Jones, General Manager Investments, Retirement and Operations, TAL
- Adam Gee, Chair, ASFA NSW State Executive Advisory Committee
- Andrew Howard, Chief Commercial Officer, Group Life & Investments, TAL

### Session 1

#### The superannuation landscape – mergers, divestment and what the industry will look like structurally in 10 years

With a number of mergers announced already in 2021 and many of the retail sector divesting their wealth arms, what will the impact of this be on the industry in 10 years? How will this affect member outcomes and competition?

#### Speaker:

- Linda Elkins, National Sector Leader, Asset & Wealth Management, KPMG

### Session 2

#### Unlocking the retirement phase – fund progress, product innovations and protection of wealth

How do funds better service members heading into the retirement phase through the protection of wealth? What types of products will best meet consumer needs and how can funds support members to get the best out of their retirement savings?

#### Speakers:

- Jennifer Dean, Partner, Retirement and Investment, Aon
- Lawrence Soo, Head of Retirement Program, TelstraSuper
- Emily Barlow, Principal, Senior Investment Consultant, Mercer

**Chair:** Dean Mulheron, Head of Group Product, MetLife

### Morning tea

### Session 3

#### The future of financial services technology

With continual changes in the use of technology across the financial services industry, the panel will discuss the use case for distributed ledger technology and what the future of finance might hold.

#### Speakers:

- Mathew Keeley, CEO and Founder, GROW Inc
- Andrew Jones, General Manager, Strategic Partnerships, ASX

**Chair:** Ash Priest, Managing Partner, Novigi

### Session 4

#### What is leading from the front - future operating models?

What is leading from the front and how do funds adapt their current operating models to ensure survival. What is the ideal future operating model for a superannuation fund in terms of insourcing/outsourcing various activities and how will this benefit a fund's value proposition in an ever-more competitive environment?

#### Speakers:

- Maree Pallisco, Partner – National Superannuation Leader, Financial Services, EY
- Kirby Rappell, Executive Director, SuperRatings
- Ian Fryer, General Manager, Chant West

**Chair:** Adam Gee, Head of Strategy, GROW Inc

### Lunch

### Session 5

#### The role of organisational purpose and leadership in a post COVID world

As organisations continue to adapt with the global impacts of the COVID pandemic, there are many lessons to be learnt about how they can grow and succeed whilst navigating these unprecedented times. How important is an organisation's purpose in its long-term success, and how do leaders keep their people connected to that purpose? What is the role of leaders in helping their people adapt to the new future of work? What do organisations need to think about in preparing for a post-COVID world? In an informal setting, Susan Lloyd-Hurwitz, CEO & Managing Director of ASX-listed company, Mirvac will discuss these topics and more – to share some insights on the role of organisational purpose, leadership and the workplace of the future.

#### Speaker:

- Susan Lloyd-Hurwitz, CEO, Mirvac

**Chair:** Deanne Stewart, CEO, Aware Super

### Session 6

#### An insider's view of Canberra and the current political climate

Former staffer and Treasury official, Glen McCrea, will give an insider's view of working in Canberra along with his insights as ASFA Chief Policy Officer, on the current political climate.

#### Speaker

- Glen McCrea, Deputy CEO and Chief Policy Officer, ASFA

### Afternoon tea

### Session 7

#### Decarbonisation: the emergence of a mega-theme

This session introduces decarbonisation and the mitigation of greenhouse gases and how investors are responding to the opportunities.

#### Speakers:

- Tim Gerrard, Portfolio Manager, Janus Henderson Investors
- Komal Jalan, Principal, Sustainable Investment Manager, Mercer
- Erwin Jackson, Director, Policy, IGCC

**Chair:** Michael Salvatico, Head of Asia Pacific ESG Business Development, S&P Global Sustainable1

### Session 8

#### Improving outcomes for members – engage, educate and advise

How can we better engage and empower members throughout their life journey? This session will explore ideas for and experiences of connecting members with information, education and advice to help them make the most of their retirement savings. It will also cover the challenges of providing scalable and accessible advice to more members.

#### Speakers:

- Andrew Dunkerley, Financial Planning Manager, AustralianSuper
- Duncan McPherson, CEO, Link Advice - Retirement & Superannuation Solutions, Link Group
- Heather Dawson, Chief Experience Officer, Active Super

**Chair:** Lindy Hunt, Head of Legal, Audit, Risk & Compliance, Club Plus Super

### Closing remarks

#### Speaker:

- Adam Gee, Chair, ASFA NSW State Executive Advisory Committee

### Networking drinks