CENTREPOINT ALLIANCE | INVESTMENT SOLUTIONS

Agenda

INVESTMENT SOLUTIONS ROADSHOW

Date	Thursday, 28 March 2019
Venue	Bond University, 'University Club Room' 14 University Drive, ROBINA QLD 4229

7:30 am	**Arrival and working breakfast**
8:00 am	**Welcome** **Georgia Nides, Business Development Manager** **Centrepoint Alliance**
8:15 am	**Centrepoint Research Model Portfolios** The Centrepoint Research team will provide an in depth look at the active and low cost model portfolios which have recently been developed for the Centrepoint Adviser Community. The team will provide details on the investment philosophy behind the models and outline the investment process used in the portfolio construction including asset allocation, style selection and manager selection. An overview of the individual strategies included in the models and the role that each plays in the portfolios will be provided. The characteristics and benefits of SMA structure which will be utilised to implement the models via a number of platforms will be discussed. **John Stamatopoulos, Senior Research Analyst** **Centrepoint Alliance**

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9:15 am	**Emerging Markets: the 'least understood' asset class is set to be the most important?** As investors bid farewell to the exceptional returns of the past few decades and contemplate lower prospective returns ahead, it's easy to feel gloomy. The silver lining is emerging markets – which stands out as offering strong potential over the next decade and beyond. But is this also the most misunderstood asset class? And if so, is this a problem or the very source of opportunity? **Ritesh Prasad, Key Account Manager** **Russell Investments**
10:00 am	**Coffee Break**
10:15 am	**Markets in Perspective** Volatility returned in late 2018. Your clients are besieged with headlines about global slowdown, trade wars, political breakdown and rising uncertainty. How do you deal with their anxieties and provide a longer-term view? This presentation brings the focus back to the investment process, showcasing how we manage portfolios and why consistent application and discipline remain the best approach. It restores the signal and turns down the noise. It provides reassurance and perspective. Don't miss it. **Dr Steve Garth, Portfolio Manager and Vice President** **Dimensional**
11:00 am	**Utilising an integrated Managed Account platform to engage clients more effectively** As usual the Financial Services market is experiencing constant change and never more so in light of the Royal Commission. Building and retaining trust with clients will be paramount as the impact of the Royal Commission if felt and the demands on changes to business model. It has never been as important to ensure that there is a clear strategy around how to engage technology to maximise business efficiency and client engagement. Praemium will explore the changing dynamics of the platform market, its integration with the Managed Account solutions and importantly how this can positively increase client engagement. **Kylie Paton, Business Development Manager** **Praemium**
11:45 am	**Closing remarks**
12:00 pm	**Finish**