

INVESTMENT SOLUTIONS ROADSHOW

7:30 am	Arrival and working breakfast
8:00 am	<p>Welcome & Solutions Division Update</p> <p>With the continued growth in support of the Centrepoint Investment Solutions, this brief session will explore some of the key adviser led developments and provide a road map looking forward.</p> <p>Matthew van Dijk, Business Development Manager, Centrepoint Alliance</p>
8:15 am	<p>Investing Amid Uncertainty</p> <p>A rapidly changing and uncertain world can make it tough for advisors to keep clients in their seats. So how about we go back to first principles? Why are you investing? What drives returns? What can you control and what can't you control? In this presentation, Dimensional portfolio manager, Dr Steve Garth, provides a scientific framework for long-term investing, one that can provide comfort for clients and a platform for growth for advisors.</p> <p>Steve Garth, Portfolio Manager and Vice President, Dimensional Fund Advisors</p>
9:15 am	<p>New Technology & Dynamic Portfolio Management</p> <p>It is generally well-known that the new managed accounts features of various platforms unlock the possibility to manage portfolios on a dynamic basis and at a lower cost. How can this best be achieved? This presentation will explore some of the difficulties of managing portfolios in practice and how these challenges may be overcome through other areas of new technology.</p> <p>Toby Lewis, Chief Investment Officer, Centrepoint Alliance</p>
10:25 am	Coffee Break

	The Client Upside of Downside Protection
10:30 am	<p>How are your clients feeling in the current market environment? They've enjoyed strong returns over the past few years, but risks lurk around the corner. In this session, we'll explore how you can draw on lessons from behavioural finance—and apply those learnings to client conversations about why 'downside protection' really matters.</p> <p>Ritesh Prasad, Key Account Manager- Researchers & Investments, Russell Investments</p>
11:30 am	Outlook & Closing Remarks Matthew van Dijk, Business Development Manager, Centrepoint Alliance
11:45 am	Finish