

INVESTMENT SOLUTIONS ROADSHOW

10:00 am		Arrival
10:10 am		<p>Passive Investing versus Active Management – Where to from here?</p> <p>A current topic headlining the news is the debate surrounding passive investing versus active management - with a number of well-respected investors weighing into the discussion.</p> <p>Since the global crisis of 2007/8, passive investing has been a very successful investment strategy. However, is this success likely to be repeated over the next ten years and what does this mean on how to position investing to future clients?</p> <p>In this presentation, Clint Abraham, Associate Director, Portfolio Specialist at Morningstar will take a deeper dive into the debate, distilling the myriad of opinions to present a balanced explanation of why indexing strategies have enjoyed such phenomenal success in recent times, whilst exploring the implications for active management and portfolio construction looking forward.</p> <p>Clint Abraham, Associate Director, Portfolio Specialist , Morningstar</p>
10:55 am		<p>Managing portfolios to deliver wealth outcomes</p> <p>Historically the fund management industry has been able to cater for clients with large pools of asset (i.e. superannuation funds, insurers and endowments). While catering to clients whom typically have relatively consistent market-relative objectives. However, as Australians and advisers take more responsibility for their individual financial security; we need to ask whether these objectives are compatible with their client's desired outcomes.</p> <p>During this session, Toby Lewis, CIO at Centrepoint Alliance, will explain how portfolio management could take a different approach. Using the investor's lifecycle as a guide, Toby will discuss how many investors face similar problems, the profound implications, and how to appreciate and measure risk at its various stages. He will offer an overview for how client objectives could be met through an investment process that focusses on asset allocation. Lastly, Toby will share his investment philosophy, the result of more than a decade of experience spent in research and portfolio management for wealthy clients.</p> <p>Toby joined Centrepoint Alliance in February 2017 in the newly created role as Chief Investment Officer. He will shortly be launching an investment strategy service that offers monthly strategy webinars and research, fully implemented portfolios, to the participation in adviser investment committees.</p> <p>Toby Lewis, Chief Investment Officer, Research, Centrepoint Alliance</p>
11:40 am		Working Lunch

Winning the Advice Revolution	
11:45 am	<p>There's a revolution underway within financial advice. New technology, the commoditisation of basic services, and a loss of faith in stock pickers and market forecasters are raising questions among the public about the value of advice.</p> <p><i>"But these threats also represent an enormous opportunity for firms who can clearly articulate and deliver real value to clients"</i> - David Haintz, Principal at Global Adviser Alpha. Veteran adviser, David Haintz, is back from the barricades with a positive message about how to win the revolution.</p>
	<p>In this rich and insightful presentation, David shows you how to build a value proposition by delivering above-the-line services that not even the slickest robot, algorithm or product-distributing advisor could ever manage.</p>
	<p>This people-centred model focuses on enriching the client experience, deepening the connection around clients' life goals and transitioning the relationship from managing money to managing behaviour.</p>
	<p>All this is grounded in David's more than two decades as a highly successful adviser, most recently as a principal and founder of Shadforth Financial Group.</p> <p>David Haintz, Principal at Global Adviser Alpha. (Brought to you by Dimensional)</p>
Closing Remarks	
12:45 pm	<p>This session will also focus on sharing any upcoming product enhancements.</p> <p>Ravi Verma, Business Development Manager, Centrepont Alliance</p>
1:00 pm	Finish