CENTREPOINT ALLIANCE | INVESTMENT SOLUTIONS

# Agenda

## INVESTMENT SOLUTIONS ROADSHOW

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| **10:00 am** | **Arrival** |
| **10:10 am** | **Passive Investing versus Active Management – Where to from here?**<br><br>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.<br><br>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?<br><br>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.<br><br>**Clint Abraham, Associate Director, Portfolio Specialist, Morningstar** |
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| **10:55 am** | **Balancing Act: A practical guide to multi-asset solutions, differences, uses and abuses**<br><br>Faced with expectations of a low return and high volatility investment environment, advisers and clients alike are grappling with how to address a developing dilemma. Namely, needing exposure to growth assets to achieve client outcomes, while at the same time managing the increasing drawdown and associated risks that come with it.<br><br>But despite the popularity of diversified multi-asset portfolios, there remains considerable confusion as to their nature, differences, purpose and role in helping to achieve client outcomes.  In this session, Scott Fletcher will look at the nature of the investor’s dilemma, and draw on Russell Investments’ insights and global experience to help advisers understand the role these strategies can play in clients’ investment solutions<br><br>**Scott Fletcher, Director, Client Investment Strategies, Russell Investments** |
| **11:40 am** | **Working Lunch** |
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| **11:45 am** | **Winning the Advice Revolution**<br><br>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.<br><br>*“But these threats also represent an enormous opportunity for firms who can clearly articulate and deliver real value to clients”* - David Haintz, Principal at Global Adviser |

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| | Alpha. Veteran adviser, David Haintz, is back from the barricades with a positive message about how to win the revolution.<br><br>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.<br><br>This people-centred model focuses on enrichening the client experience, deepening the connection around clients' life goals and transitioning the relationship from managing money to managing behaviour.<br><br>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.<br><br>**David Haintz, Principal at Global Adviser Alpha. (Brought to you by Dimensional)** |
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| **12:45 pm** | **Closing Remarks**<br><br>This session will also focus on sharing any upcoming product enhancements.<br><br>**Ravi Verma, Business Development Manager, Centrepoint Alliance** |
| **1:15 pm** | **Finish** |



Ventura Investment Management Ltd
ABN 49 092 375 258 I AFSL No.253045
Level 9, 10 Bridge St, Sydney NSW 2000
1300 557 598 | centrepointalliance.com.au