Count

National Conference

Canberra

13–16 February 2024

count.au/conference

Dynamic Perspectives

PROGRAM | DAY ONE

TUESDAY 13 FEBRUARY		
10:00am to 4:00pm	Count Charitable Foundation Golf Day	Gold Creek Golf Club Canberra
5:00pm to 7:00pm	Registration desk open	Main Foyer, National Convention Centre
5:00pm to 7:00pm	Registration Drinks & Exhibition area open	Exhibition Hall, National Convention Centre

PROGRAM | DAY TWO

WEDNESDAY 14 FEBRUARY		
6:00am to 7:00am	Run with the CEO, Hugh Humphrey	Meet Point: Front steps of National Convention Centre
6:00am to 7:00am	Cycle with Darren Stevens, twomeys	Meet Point: Front steps of National Convention Centre
6:00am to 7:00am	Salsa with Sue Hardwick, Count Charitable Foundation A donation to Soldier On is encouraged when participating.	Main Foyer, National Convention Centre
8:45am to 9:05am	Conference Opening	Royal Theatre, National Convention Centre
9:05am to 9:10am	Welcome to Country	Royal Theatre, National Convention Centre
9:10am to 9:30am	CEO Address | Hugh Humphrey, Chief Executive Officer | Count	Royal Theatre, National Convention Centre
9:30am to 10:10am	Andrew Inwood, Global CEO | CoreData	Royal Theatre, National Convention Centre
10:10am to 10:45am	**Morning Tea | Networking Break**	**Exhibition Hall, National Convention Centre**

1 |	**10:45am to 11:30am**	Royal Theatre	**Emerging technologies and opportunities in financial services** Greg Hansen, Executive, Group Strategy | HUB24 How will emerging technologies like large language models, machine learning and AI provide opportunities for financial services professionals? What are the key demographic trends that will influence the use of emerging technologies? The presentation will include key learnings from our Innovation Lab where we are leveraging emerging technology to look for ways we can streamline the delivery of financial advice.	Bradman Theatrette	**Creating a portfolio which improves client retirement outcomes** Justine Marquet, Head of Technical Services | Allianz Retire+ Advice about how to restructure financial affairs, including superannuation, for retirement can help Australian's feel confident about when and how to ultimately cease work and utilise their accumulated wealth to support their lifestyle for the rest of their life. This session will present findings from recent research looking at how portfolio construction decisions impact clients' retirement outcomes. We will identify when and how an allocation to a lifetime income stream can help advisers manage risks in retirement and deliver better outcomes.	Nicholls Theatrette	**Real Assets in volatile markets** Mark Mazzarella, Portfolio Manager Real Estate | Dexus Investment markets have been subject to heightened levels of volatility in recent periods, the drivers of which show varying signs of stabilising. For investors looking to Real Assets in volatile times, an active allocation to REITs may be an attractive proposition for client portfolios.	Sutherland Theatrette	**Does your tech stack own you or the other way around?** Facilitated by Natalie Redman, Senior Manager, Advice Technology | Count Vincent Holland, Co-Founder | Plutosoft Rick Di Cristoforo, Director of Wealth Product | Adviser Logic (Morningstar) Johann Koch, Chief Sales Officer | Intelliflo Simon Betchley, CEO | Worksorted When analysing your tech stack, ask yourself: What problems are you looking to solve; What does the future state of tech look like; How to get buy in from your staff and how to effectively manage the change process. Panel Session	Menzies Theatrette	**Navigating the storm: tools and strategies when clients are in financial distress** Scott Anderson, Principal VIC | Worrells Jason Bettles, Principal QLD | Worrells Joanne Keating, Principal NSW/ACT | Worrells The idea stemmed from professional accountants, particularly in the current environment, often coming face-to-face with clients struggling financially. The idea is for the session to equip them with the knowledge and resources to help them more confidently guide their clients through turbulent waters, and also recognise when it is time to bring in external help.
11:30am to 11:40am							Transition				
2 |	**11:40am to 12:25pm**	Royal Theatre	**Retail broking advice trends and opportunities into 2024** Ryan Davis, National Key Accounts Manager | Desktop Broker, Craig Saunders, Group Head of Sales | Bell	Bradman Theatrette	**Building and breaking retirement income strategies** Andrew Lowe, Head of Technical Services | Challenger Building out a strategy to maximise retirement income for a client, all the while protecting against the risks faced by clients in retirement, is	Nicholls Theatrette	**No Session**	Sutherland Theatrette	**Increasing client satisfaction with digital engagement** Samantha Hawkins, General Manager, Southern | Praemium It's well established that a digital advice experience is expected by investors. But what specifically do they want and how can you	Menzies Theatrette	**Unlocking Profit Potential: Strategic Pricing for Accountants** Colin Dunn, Co-Founder & Director | Panalitix In this engaging session, we dive into the art and science of pricing strategies tailored specifically for Accountants. Discover how to set prices that not only

			Financial Group and Grady Wulf, Market Analyst | Bell Financial Group **Ryan Davis**, National Key Accounts Manager (Desktop Broker) takes a look at ways to solve the advice accessibility and affordability problem on the modern financial advisory firm through the development of new digital solutions and changing the relationship and service propositions for the provision of financial advice. **Craig Saunders**, Group Head of Sales - Bell Financial Group, will discuss how to manage the breadth of financial products available to advisers, along with the impact of the recent exodus of brokers from the retail advice market, and where this leaves advisers who are looking to outsource their equities investment strategy. **Grady Wulff**, Market Analyst Bell Direct & Desktop Broker will provide a markets overview from Bell Potter & 2 stock tips to consider in portfolios in 2024.		an interesting challenge in balancing sometime competing objectives. In this highly interactive session, you will help build out a retirement strategy for a typical client. We will then set out to break that strategy with a view to testing its suitability and sustainability. We'll talk about safe and unsafe withdrawal and spending. We'll discuss life changes that impact retirement advice. We'll talk retirement income technicalities, including a deep dive into the tax considerations of superannuation income stream (including post-death) and important retirement income strategy practicalities.				create a digital engagement experience that increases client satisfaction? Praemium will take a look at what investors want in a digital investor portal and the features you can provide to deepen your engagement and provide a richer, more satisfying experience for your clients.		reflect your value but also maximize your profitability. We'll explore proven techniques to align your pricing with client expectations, create transparent pricing structures, and ultimately enhance your firm's financial success.
12:25pm to 1:10pm			**Lunch | Networking Break**				**Exhibition Hall, National Convention Centre**				
3 |	**1:10pm to 1:55pm**	Royal Theatre	**Picking skill from dumb luck: the dark arts of manager research** Brian Parker, Chief Economist | Australian Retirement Trust When does active management offer value for money and when does passive make more sense? What kind of macro or market environments suit active strategies? When it comes to using active managers, what constitutes value for money? Genuinely skilled active managers don't grow on trees and – more often than – don't come cheap. If you're prepared to pay for active management, how do you pick a manager with genuine skill? What criteria really matter? This presentation provides insights gleaned from several decades of manager research and portfolio construction, using both active and passive approaches, across a range of asset classes.	Bradman Theatrette	**From Bonds to Beyond: Fixed Income's Modern Makeover** Anthony Kirkham, Head of Investment Management/Portfolio Manager | Franklin Templeton The Western Asset team dive into a macro update on Australian interest rates, RBA insights, and inflation trends—a crucial exploration for investors. Discover the pivotal role of fixed income in fortifying portfolios amid market shifts. In a concise session, grasp the essentials of Fixed Income's Modern Makeover, offering insights essential for strategic investment decisions in today's dynamic financial environment.	Nicholls Theatrette	**Private Equity: Maximising returns within the current market environment** Christopher Mauss, Co-Head Asset Class Experts & Global Consultants, Private Equity | Partners Group The Private Equity industry has seen an evolution of return drivers over the past 40 years. PE Managers have previously used financial engineering as the primary mechanism for maximising returns however we have seen a significant shift as mangers now focus their energy on operational improvements and utilising a disciplined underwriting approaches to drive returns. During this session, Chris will outline the different ways to identify investment opportunities and discuss what value creation strategies can be implemented to build businesses, produce profits and differentiate themselves within the market.	Sutherland Theatrette	**Optimising Technology for Integrated Firms** Facilitated by Fran Schluter, Operations Manager | Count Rohan Berry, Chief Technology Officer | Xeppo Simon Jeffery-Bilich, Head of Practice Development & Research | Count Christine Robinson, COO & Director | 4Front Dan Beck, CEO | Kloud Connect Successful revenue uplift and overall growth for an integrated firm is contingent upon multiple key areas within the people, process and technology framework. In this presentation, we explore the strategies behind these areas and the crucial role data and technology plays in maximising service, revenue and client growth. Count's Head of Practice Development & Research, Simon Jeffery-Bilich, will provide an overview of where Count firms currently sit in the key areas and how to address the challenges and opportunities to drive success. Christine Robinson from 4Front will take us on their successful journey in building an integrated advice business and realising their growth opportunities. Rohan Berry from Xeppo will discuss the importance of data security, cleanliness and management, and how successful integration of technology and data integration platforms such as Xeppo cannot occur without understanding the people and process problems. Dan Beck, CEO of Kloud Connect, an industry leading cloud based practice management system, will discuss how firms can harness the power of data to optimise their operations and provide valuable insight to make better business decisions. Panel Session	Menzies Theatrette	**Structuring for Succession - Who owns What** Dr Craig West, Founder & Executive Chairman | Succession Plus As owners prepare to exit, they need to examine various aspects to ensure maximum business value and successful exit. The business, the finances and the owners all need to be prepared. This real client case study will walk you through the key structural changes needed to protect assets, drive business value and prepare owners for exit and/or retirement.
1:55pm to 2:05pm							Transition				

4 |	**2:05pm to 2:50pm**	Royal Theatre	**Global Equities panel: Where to Invest, Where to avoid** Facilitated by Adam El-Ansary, Senior Manager Research & Markets | Count Kevin Bertoli, Co-Portfolio Manager Global & Australian Equities | PM Capital Chris Adams, Head Investment Specialist | Pendal/Perpetual Where to next for global equity markets? A panel discussion with three investment managers in AllianceBernstein, Pendal and PM Capital on the current state of play in markets.. We will hear each manager's best ideas and how they are positioning portfolios and navigating the uncertainty plaguing our world. Panel Session	Bradman Theatrette	**Global Listed Infrastructure - real income and structural growth** Trent Koch, Portfolio Manager, Global Listed Infrastructure | First Sentier Investors Listed infrastructure provides essential services to society, making it less sensitive to the economic cycle. Growth is being driven by long term structural themes such as the build-out of renewable energy; the need to ease urban congestion; and increasing reliance on mobile data. In this presentation, Trent Koch, Portfolio Manager, will provide an overview of the asset class and its benefits, and look at the structural shifts which are fundamentally changing the global listed infrastructure universe, providing growth opportunities for years to come.	Nicholls Theatrette	**Deep dive into Private Equity Investing** Eric Greer, Manager, Private Assets | Schroders The Private Equity industry has seen an evolution of return drivers over the past 40 years. PE Managers have previously used financial engineering as the primary mechanism for maximising returns however we have seen a significant shift as mangers now focus their energy on operational improvements and utilising a disciplined underwriting approaches to drive returns. During this session, we will outline the different ways to identify investment opportunities and discuss what value creation strategies can be implemented to build businesses, produce profits and differentiate themselves within the market.	Sutherland Theatrette	**Good is the Enemy of Great** Tim Rogers, Head of Distribution | DASH Technology Group There may be significantly fewer financial advisers officially offering financial advice to Australians, but there remain thousands of advice practices in Australia. The business models are numerous, and the competition has never been hotter, fueled by a concentrated supply of advice practices offering experienced and/or degree qualified advice professionals to Australians who are fee discerning and demanding more for those fees. So how do you ensure your Client Value Proposition is better than just good? How do you continue to attract and retain the types of clients you want to advise, not just the types of clients you are currently advising? Funnily enough, it got less to do with the adviser themselves and more to do with the people and processes that support them. Excellence in advice process, people, technology utilisation, financial management, business strategy and execution, and branding and marketing is what separates a great business from the sea of their good competitors.	Menzies Theatrette	**Automation & AI for your Practice** Liam Hindle, Segment Product Marketing Lead | MYOB AI is at the front of everyone's mind and on the tip of everyone's lips. If it lives up to expectations, AI could have a truly unprecedented impact on the way that we work. Does this revolution come at no cost? How can we make the most of it now without jeopardising our professional standards and ethics? As a partner or a business owner, you're ultimately responsible for advice given to your clients. Are you ready to be on the hook for machine generated expertise? In this talk, Liam Hindle from MYOB will lead a conversation about how AI can benefit professional services firms now by improving productivity, capacity, and capability. He'll also explore the role of trusted and established vendors in providing tools powered by responsible AI. Finally, the talk will offer some things to consider that protect the interests of accounting firms, partners and professionals while finding new ways to deliver more to clients.

2:50pm to 3:25pm	**Afternoon Tea | Networking Break**	**Exhibition Hall, National Convention Centre**
3:25pm to 4:25pm	Matina Jewell | Keynote Session	Royal Theatre, National Convention Centre
4:25pm to 4:30pm	Close	Royal Theatre, National Convention Centre
6:30pm to 9:30pm	**Welcome Evening**	**The Arboretum**

PROGRAM | DAY THREE

THURSDAY 15 FEBRUARY

7:15am to 8:15am	Women in Finance Breakfast	Hyatt Hotel, Canberra
9:00am to 9:05am	Welcome to Day Three	Royal Theatre, National Convention Centre
9:05am to 9:15am	Count Charitable Foundation, Barry Lambert Barry Lambert, founder of Count and Chair of the Count Charitable Foundation (CCF), will share his reflections on 20 years of running the Foundation. He will cover the CCF involvement with the 2024 Count National Conference and the work of the charity partner this year, Soldier On by interviewing CCF's own Sue Hardwick.	Royal Theatre, National Convention Centre
9:15am to 9:25am	Transition	

5 | 9:25am to 10:10am

Royal Theatre

Professional Standards Dynamic Update
Phil Creswell, Head of Professional Standards | Count & Cameron Lewis, Senior Manager - Supervision & Monitoring | Count
Provision of a relevant and contemporaneous update on key regulatory and risk areas impacting the compliant provision of advice and other documentation requirements.

Sutherland Theatrette

Why even Rock Bands need to be on the same page
Raelene Hinchliffe, Group Head of People & Culture | Count
Adam Webb, Head of Acquisition Strategy & Growth | Count
Having clarity of purpose, or knowing 'why we exist', is an essential ingredient of any high performing team. In this 45 minute presentation we will explore the benefits of your team having clarity of purpose and how it can positively impact perspective and productivity.

Menzies Theatrette

Unlocking client value through strategic questioning
Simon Starr, Director | OHS
Many businesses are leaving a lot of money on the table because they could improve how they structure up conversations for better demonstrating their true value to a client through the services they provide. In this insightful session learn how to build buying tension to create a neat compatibility fit between the client's needs and your offering to accelerate your growth.

10:10am to 10:45am	**Morning Tea | Networking Break**	**Exhibition Hall, National Convention Centre**

6 | 10:45am to 11:30am

Royal Theatre

The Evolution of Fraud
Lucy Barton, Cyber Culture and Outreach Lead | Macquarie
Join Macquarie Bank's specialist fraud and cyber security team as they will explain some of the current threats and risks targeting clients and what you can do to manage them. This session is designed to help raise your awareness on scam prevention and cyber security, so you can better protect yourself and your clients from fraud and cyber threats.

Bradman Theatrette

Lessons learnt from 20+ years of small cap investing
Steve Black, Senior Fund Manager | Pengana Capital
The Pengana Emerging Companies Fund, managed by small cap specialists Ed Prendergast & Steve Black since its inception, will this year celebrate it's 20th anniversary.
Join us for an insightful look into the journey of the fund from 2004 to present day; the hits, the misses and how to avoid the 'steaming divots' that regularly appear at the smaller end of the market.

Nicholls Theatrette

The six point plan to the macro outlook
Kerry Craig, Global market Strategist | JP Morgan Asset Management
There are six thing that create the core of any discussion on the macroeconomy and capital markets. This session provides a succinct outlook to the world at large and illustrates the tools available to build your own world view.

Sutherland Theatrette

Working with Women and their Wealth
Facilitated by Lauren Jackson, Sales Director | Fidelity International
Heidi Schwegler, Certified Financial Planner | AHS Financial
Tania Tonkin, Director | DCMA Advisory
Insights from advisers who work closely with female clients - including women who lead the financials in a relationship, single/divorced and widowed.
Also looking at the role women play as the sole decision-maker for the distribution of wealth to the next generation.
Panel Session

Menzies Theatrette

Tax and GST Treatment of Sub-Division
Bruce Thomas, Senior Tax Trainer | Chartered Accountants Australia and New Zealand
This session will explore the current treatment and issues of property subdivisions for Income tax, CGT and GST. It will focus on the treatment of various land and property disposals, and compulsory acquisition of property.

11:30am to 11:40am	Transition

7 | 11:40am to 12:25pm

Royal Theatre

Should you walk or stand on an escalator?
Michael Tran, Technical Consultant

Bradman Theatrette

Markets & Macro Expert Panel (including 3 stock to watch for 2024)

Nicholls Theatrette

Driving performance: Looking under the bonnet of your ETF
Russel Chesler, Head of

Sutherland Theatrette

Automation for your Clients

Menzies Theatrette

Business Valuation Tips and Traps
Dr Craig West, Partner, PKF Newcastle & Sydney | Succession

			| BT What if it was a travellator? Is it a question of etiquette or ethics? We are faced with a range of dilemmas and decisions in everyday life, and sometimes the answers might differ. In this session we will explore a range of ethical scenarios to determine what courses of action are available, and whether there is one right answer or not.		Emily Pearson, Sales Executive | Pinnacle Investment Management Jacob Mitchell, Founder & CIO of specialist global equities investment manager | Antipodes Andrew Parsons, Founder & CIO of specialist REIT manager | Resolution Capital Don Hamson, Founder & CIO of specialist retirement income investment manager | Plato Investment Management Three of Australia's most experienced investors will cover all the big questions regarding Australian and global stock markets and the macroeconomic outlook for 2023. The panellists will share their views and insights on where markets are heading in 2024, and the best opportunities and greatest risks in their respective asset classes. They will also take questions from the floor. Panel Session		Investment and Capital Market | VanEck In 'Looking Under the Bonnet', Russel presents a framework for assessing the engine that drives an ETF's performance - the index. Tracing back from the Dow Jones to the latest innovations, he discusses the history of indexing and guides you through two case studies in index innovation. Gaining a deeper understanding of an ETF and the index it tracks will help you achieve optimal outcomes for your clients.		Facilitated by Brett Edwards, Advice Technology Manager | Count Rob Cameron, CEO / Founder | FYI Stacie Shaw, Strategic Ambassador Partner, PKF Newcastle & Sydney | Annature In this session, we will discuss the power of automation and process efficiencies which can be achieved through harnessing the combined strength of the eco-system available to modern practices. Hear practical advice from Stacie Shaw, Partner PKF a large multi disciplinary Count practice on their path to efficiency internally as well as externally to clients. FYI and Annature are Australian based technology providers who are market leaders in their fields. FYI provides online document and practice management solutions with integrated collaboration tools and a powerful automation engine. Annature specialises in digital signing automation and identity verification solutions. Together they provide end-to-end seamless workflows to collaborate with clients. Panel Session		Plus Business valuation is often described as more art than science – but it doesn't have to be. Find out the key inputs and how they rank and compare as value drivers, Industry benchmarks and non-financial aspects that determine risk. The key parameters for SME business valuations and the value potential equation.
12:25pm to 1:10pm			**Lunch | Networking Break**				**Exhibition Hall, National Convention Centre**				
8 |	**1:10pm to 1:55pm**	Royal Theatre	**Generating Tax Alpha – How Investment Bonds can help your Trust structure** Felipe Araujo, Executive Director and General Manager | Generation Life Beware of headline returns, they are not consumable returns. Understand the powerful tax advantages of investment bonds and how they can assist your clients accumulate and transfer their wealth. Investment bonds are "tax paid" investment at a maximum rate of 30%, however the actual effective rate of tax paid can be significantly less. This session explores the taxation treatment of Investment bonds, addresses misnomers with the structure, explores how Generation Life reduces the cost of tax and improves after tax returns. Felipe will apply Investment Bonds to real life cases and show how a Trust can own a Bond as a perfect alternative to a Corporate Entity beneficiary.	Bradman Theatrette	**Global SMID Cap Equities – recapturing exposure to an under-appreciated asset class** James Langlands, Managing Director & Head of Wholesale Distribution | MFS There is a strong case for advisors to consider an allocation to Global Small and Mid-Cap (SMID) companies in their portfolios. As mega-cap tech companies have grown and taken up dominant positions in Global Equity indices, the average exposure to Global SMID companies in those indices has halved over the last decade. This limits the opportunity to capitalise on the return potential of these businesses - over the last 20 years Global SMID companies have outperformed their Large Cap counterparts by ~170%. The local industry also recognizes this gap in clients' portfolios and Global SMID Equities are forecast be one of the fastest growing areas both for portfolio allocations and new products coming to market. MFS have been running small and mid-cap equity strategies for over 10 years and currently oversee over $50bn in Global SMID equities around the globe.	Nicholls Theatrette	**Dealing with lumpy assets in SMSF** Craig Day, Head Of Technical Services | Colonial First State This session covers the different issues that need to be considered when advising SMSFs with large lumpy assets. Topics discussed include: - getting lumpy assets into SMSFs - lumpy assets and the sole purpose test - liquidity issues and investment strategies - lumpy assets and pensions - retirement and death benefit issues where the fund holds large lumpy assets	Sutherland Theatrette	**What's driving practice profitability in 2024?** Kerry Ong, General Manager – Customer | Iress New research from Iress and Business Health highlights major trends and changes in how technology is used by Australian advisory practices to drive performance and profitability. The research uncovers the secrets of Australia's most profitable advice practices, and tracks the progress of the industry over the past two years.	Menzies Theatrette	**Remunerating owners for the future** Bruce Thomas, Senior Tax Trainer | Chartered Accountants Australia and New Zealand This session will look at the various ways of remunerating owners of businesses and the tax pitfalls to be avoided.
1:55pm to 2:05pm							Transition				
9|	**2:05pm to 2:50pm**	Royal Theatre	**Pricing your Advice** Facilitated by Murray Fogarty, Practice Development Manager | Count Alex Lee, Financial Planner | McQueen Financial Group	Bradman Theatrette	**Why do I need an Investment Philosophy?** Veronica Klaus, Head of Investment Consulting | Lonsec At its essence an investment philosophy should reflect your broad set of investment beliefs, why you believe it and how it impacts how you advise	Nicholls Theatrette	**Wealth beyond generations** Leah Willis, Head of Client Relationships | Australian Ethical As the Australian financial landscape undergoes a transformative shift, Australian Ethical and CoreData have united to present	Sutherland Theatrette	**Ethics and governance- In business, with clients** Michael O'Neill, Portfolio Manager | IML/Natixis Ethics are mandatory in the advice process but are also critical in our client relationships, how we communicate, and our business	Menzies Theatrette	**Hot topics for practitioners** Lee-Ann Hayes, Head of Tax Education | Accurium Tax law is complex and ever-changing. Staying informed of these changes, and the impact to your clients, is essential for all accounting and finance professionals.

	Phil Smith, Financial Planner | Hunter Financial Matthew Ripley, Financial Planner | Chapters Retirement Partners Setting an appropriate price point for advice has always been important consideration for any advice business. This includes fees from initial meetings through to ongoing service. Advisers need to create value for their clients and the challenge is to assign a price that enables them to deliver that value profitably. For most clients, value is perceiving that they are getting more than what they are paying for. Most firms seek clients that will value and pay for their advice and an on-going, trusted relationship. Lifting fees in an environment of rising costs is a challenging thing to work through and then implement. We talk to a few firms that have undergone this transformation over recent times, the approach they have taken to lift fees, and the impact this has had on their business. Panel Session		clients about investing. If you plan to use it in marketing your practice, use client-friendly language, not technical jargon. This session will cover off the Do's and Don't's of drafting and implementing an Investment Philosophy		a compelling exploration of the changing tides in wealth accumulation and transfer.		growth. This session will discuss how they are interrelated and provide practical ethics and governance examples with lessons for practices to implement in daily business. We will also address effective implementation of these principles, which can often be detached from technical definitions and human practices.		In this session we deliver a practical update examining recent and relevant: • legislative changes • ATO rulings and other advice • case law decisions and • Government announcements Gain an understanding of the application of the tax issues impacting SMEs and individuals via practical explanations, examples and case studies.

2:50pm to 3:25pm	**Afternoon Tea | Networking Break**	**Exhibition Hall, National Convention Centre**
3:25pm to 4:25pm	Chloë McCardel | Keynote Session	Royal Theatre, National Convention Centre
4:25pm to 4:30pm	Close	Royal Theatre, National Convention Centre
6:30pm to 10:30pm	**Equity Partner Evening**	**The Marion**
	Evening at Leisure | Conference Partners hosted dinners	

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Count

Dynamic Perspectives

PROGRAM | DAY FOUR

FRIDAY 16 FEBRUARY

7:15am to 8:15am — Emerging Advisers Breakfast — Swan Room, National Convention Centre

8:45am to 9:25am — Grant Hackett | Keynote Session — Royal Theatre, National Convention Centre

9:25am to 9:35am — Transition

10 | 9:35am to 10:20am

Royal Theatre

Tunnel Vision
Charles Stodart, Investment Specialist | Zurich Investments
From time to time, the market can become obsessed with a small group of stocks, apparently blinkered to all else. Driven by a compelling narrative and fuelled by investor enthusiasm, the extent of the exuberance is often only apparent with hindsight. The scale of the market concentration today remains the big question for investors as to whether we are entering an exciting new era or cresting a hype cycle. Looking beyond the immediate, long-term investors are more interested in return streams and profit pools over the next decade. These can be one or two steps removed from the initial proposition and are not always obvious at the outset, whether that be in today's obsession with digital transformation or the push for guilt-free decarbonization. This presentation will look under the bonnet of current market drivers to consider what else investors could be thinking about in their pursuit of superior risk-adjusted returns.

Bradman Theatrette

Artificial Intelligence – the game changer
Bradley J. Betts, PhD, Managing Director | BlackRock's Systematic Active Equity Group
This session will take a deep dive into what Artificial Intelligence (AI) and machine learning is. Advisers will learn its history, how it works and its implications. Brad will also speak to the significant risks and opportunities that this humanity-changing technology will bring to our everyday lives. Finally, we will hear the potential of leveraging AI within investing and where to from here?

Nicholls Theatrette

Truth or Dare (to be different)
Eric Marais, Investment Specialist | Allan Gray
We're in a long economic cycle. The investment world has been dominated by a select few asset classes, sectors and securities (including Australian housing!). This is the most dangerous time for investors because we extrapolate, treating the landscape of the last 10-15 years as investment "truth". It is time to take a fresh look at those truths, and dare to be different. In this presentation, we examine the cognitive biases that cause us to mistake trend for truth—and we break down some exceptional opportunities on offer as a result of those biases.

Sutherland Theatrette

Tax nuances blunting insurance advice
Benjamin Martin, National Technical Manager | AIA
The taxation laws underpinning traditional insurance advice are generally well understood and settled, yet we still see meaningful tax planning opportunities being overlooked, to the detriment of clients and their beneficiaries.
In this technical strategy session we unpack where these tax planning nuances have been emerging as of late, so that accountants and advisers are maximising value for clients through both the tax and life risk advice chain.

Menzies Theatrette

Trust distributions – The practical aspects
Lee-Ann Hayes, Head of Tax Education | Accurium
Trusts are a popular choice for a business or investment structure The latest ATO taxation statistics show that in the 2020-21 income year more than 947,000 trusts lodge tax returns declaring more than $428 billion of business income. Whilst trusts are a popular choice, the rules governing the taxation of their income can be complex.

In this session we explore the practical implications of how drafting trust income and/or capital resolutions impacts the amount of tax a beneficiary will be subject to. We further examine how resolutions influence any subsequent amendments to taxable income by the ATO and look at when and how to stream income to specific beneficiaries. The session also provides practical steps needed not to fall foul of the ATO's increased scrutiny of trusts under s. 100A and Div 7A post year end with respect to the distributions made.

10:20am to 10:55am — **Morning Tea | Networking Break** — **Exhibition Hall, National Convention Centre**

11 | 10:55am to 11:40am

Royal Theatre

Navigating Aged Care: Real-World Insights for Financial Planners
Facilitated by Wally David, Practice

Bradman Theatrette

Risky Business
Scott Hoger, National Manager, Education and Partnerships | TAL Life

Nicholls Theatrette

The Global Consumer: Structural Growth Opportunities
Tracey Wahlberg, Investment

Sutherland Theatrette

Succession Planning for Exit
Olia Petkova, Head of Corporate

Menzies Theatrette

Cognitive Decline, your clients your risks
Bruce Thomas, Senior Tax Trainer

			Development Manager | Count Jenneke Mills, Head of Technical Service | MLC Jason Burley, Adviser | Burley Aged Care Advice Ever wondered where you can add value when it comes to aged care advice and how to articulate this value to clients? Don't do aged care advice all the time, but want to go into client meetings ready to ask the right questions and with enough knowledge to be able to identify red flags and advice opportunities? Better still – would you like to know more about how the advice your clients are receiving today from you and other professionals could significantly impact aged care and estate planning outcomes down the track? Panel Session		Limited Risk management goes beyond the underlying product. The product simply facilitates the advice. How a policy is owned can determine funding, tax and estate planning outcomes. Through a change in mindset, this session delves into how financial advisors can add significant value for their clients through tailored structural advice.		Analyst | Magellan Asset Management This presentation focuses on the big picture thematics that will impact returns for the global consumer sector over the next 3-5 years. In the near-term, consumer companies are (still) contending with pandemic-driven demand distortions, disinflation, interest rates, and rapid changes in consumer behaviour. More broadly, the disruptions of the past few years have driven fundamental changes to the competitive landscape and to the sources of competitive advantage that are critical for global companies. Competitive barriers have risen owing to rising rates. Artificial intelligence is improving speed to market and frictionless retail. US housing is in short supply and in need of repair. One thing is clear – the next 10 years will not look like the last. Investors that can adapt to the new reality with thoughtful bottom-up research will be rewarded		Finance – Mergers & Acquisitions | Count Market valuations remain attractive for exiting Principals in accounting and financial planning businesses when the company is well-prepared for the exit. Whether you are buying or looking to exit, what are the key factors which support these attractive valuations for an accounting or financial planning business?		| Chartered Accountants Australia and New Zealand 30% of Australians aged over 80 suffer from some form of dementia. The loss of capacity across a generation that has accumulated $3.5 trillion in assets raises serious issues for individuals, their families, and their trusted advisers. This session, crafted by industry experts, will provide advisers with key tools to help clients and their families through this crucial juncture. (you may wish to just take the section underlined, depending on space)
11:40am to 11:50am							Transition				
12 |	**11:50am to 12:35pm**	Royal Theatre	**Granny Flat right or wrong** Jenneke Mills, Head of Technical Service | MLC Ruby is ageing. She could do with some help around the house (which is getting harder for her to maintain) but she won't entertain home care or aged care just yet. Her kids would like to see more of her. They are struggling themselves with a large mortgage and their own young family, with increasing demands on their time and financial resources.	Bradman Theatrette	**No Session**	Nicholls Theatrette	**Education and Wealth Transfer** Mark Cameron, BDM – NSW | Futurity Investment Group Amy Parons, BDM - VIC | Futurity Investment Group In this session, you will learn how you can offer your clients a flexible and tax-effective solution to education funding and estate planning certainty. We will demonstrate how education bonds can assist your clients with strategic solutions across wealth creation, tax-paid investing, planning and investing for the future costs of education, and securely passing on wealth to future generations.	Sutherland Theatrette	**Cyber Insurance** Facilitated by Reg Gabila, Head of Licensee Systems | Count Andrew Terzakis, Director | Marsh Advantage Insurance Damien McKern, Principal | McKern Strategic Pty Ltd Sean Edmonds, Principal | Digital02 Cyber Insurance provides protection against the financial losses that can result from a cyber-attack or data breach. It is becoming increasingly important for businesses of all sizes to have this coverage as the frequency and severity of cyberattacks continue to rise. The panel will include Count business owners who will share their most recent cyber-attack and data breach experiences, the effectiveness of their cyber response plans, learnings and the support provided by their cyber insurance brokers and providers. Panel Session	Menzies Theatrette	**The Art of Delegation in Accounting: Improving Lifestyles, Growth and Value** Mark Ferris, Chairman & CEO | Panalitix Talented Accountants have unique, rare skills which are in high demand, but this can lead to a constant spiral of 'busy-ness'. The results is a lack of personal time while neglecting to work ON the business. Delegation is one solution and Accountants who shift their mindsets and learn the skills of delegation can enjoy business growth and a balanced lifestyle. Join us for this practical, interactive, fun session to hone your skills in delegation.
12:35pm to 1:20pm			**Lunch | Networking Break**				**Exhibition Hall, National Convention Centre**				
13|	**1:20pm to 2:05pm**	Royal Theatre	**What possibilities can technology unlock in your practice?** Facilitated by Reg Gabila, Head of Licensee Systems | Count Matt Heine, CEO | Netwealth Nowaki McQueen-Tokita, Managing Partner | McQueen Financial Group Join Reg, Matt and Nowaki as they explore the ways in which advisers are harnessing technology to enhance their value proposition. They'll delve into the impact of technology on investment philosophy and the customer experience, and the driving forces behind these changes. Discover, with examples, the potential	Bradman Theatrette	**Mastering Investment Leadership: Lessons Learned from a Former CIO** Pete Gunning, Vice Chairman and former Global Chief Investment Officer | Russell Investments Hear from Pete Gunning, currently Vice Chairman and former Global Chief Investment Officer with responsibility for more than $300 billion in assets. Discover the art and science of investment leadership as Pete shares what it takes to build and maintain a world-class investment engine that can deliver exceptional results for the world's most demanding investors. Pete's extensive expertise comes to life through a collection of anecdotes, illuminating his observations and	Nicholls Theatrette	**Faster, Smarter, Efficient: Leveraging technology to scale your business** Ercan Boduk, Senior Customer Success Manager | Morningstar In today's ever changing advice landscape, Advisers and clients alike demand a level of efficiency that can only be achieved through strategic technology implementation. In this presentation, we will navigate ways you can leverage technology to not only streamline existing processes but also scale your business for growth. From optimizing workflows to embracing innovative solutions, the intelligent use of technology can	Sutherland Theatrette	**The Power of Strategic Outsourcing/Offshoring for your Business** Facilitated by Mick Gay, Head of Operations – Core Firms | Count Natasha Daniels, Head of Sales | VA Platinum Scott Brooks, General Manager | Collective Resourcing Krish Sritharan, Managing Director | Solutions Centric This session will provide valuable insights into successfully integrating outsourcing/offshoring	Menzies Theatrette	**Class Benchmark Report review on SMSF contributions data and common strategies** Kate Anderson, General Manager, Operations | Class Overview of key takeaways from 2023 Class Annual Benchmark Report for member contributions. Including trends and insights for concessional, non-concessional and downsizer contributions. Common strategies to maximise retirement savings.

National Conference

Canberra
13–16 February 2024
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Dynamic Perspectives

of technology in advice practices, and gain insights into future investment risks and opportunities. Panel Session	interactions amidst some of the most euphoric – and devastating – market extremes on record.	enhance speed, intelligence, and overall efficiency in your operations.	into your business with guidance around the barriers that our panel see their clients often face.. The panellists will share their opinions on the opportunities at present and how your business can be equipped to ensure success when utilising outsourcing/offshoring talent. Panel Session	

2:05pm to 2:15pm		Transition
2:15pm to 3:15pm	Saroo Brierley | Keynote Session	Royal Theatre, National Convention Centre
3:15pm to 3:30pm	Wrap up Andrew Kennedy, Chief Advice Officer | Count and Mick Gay, Head of Operations – Core Firms | Count	Royal Theatre, National Convention Centre
3:30pm to 4:00pm	**Afternoon Tea | Networking Break**	**Main Foyer, National Convention Centre**
6:00pm to 7:00pm	**Drinks & Canapes**	**Main Foyer, National Convention Centre**
7:00pm to 11:30pm	**Gala Dinner**	**Exhibition Hall, National Convention Centre**