IMAP ADVICE IN ACTION 2024

DIGITALISATION & CLIENT CENTRIC ADVICE

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PRINCIPAL ADVICE SPONSOR

Mike Pope - General Manger LaVista Licensee Solutions & MC

Mike has more than 30 years' experience in the financial services industry and worked in management and leadership teams across the industry including ClearView Financial Advice, Executive Director and Responsible Manager for Millennium3 and AXA Australia and more recently Centrepoint Alliance.

These roles involved the strategic planning of licensee services and supporting the growth and development of adviser businesses.

As part of the Centrepoint Alliance group, Mike's role in LaVista Licensee Solutions is to provide comprehensive licensee services and support to the boutique AFSL market.

Toby Potter - Chair, IMAP

Toby has championed IMAP's mission for a number of years and is a key contributor for IMAP (along with others) in the representation to ASIC on recent changes to the MDA regulations and ongoing regulatory matters.

His experience in the wider investments market is extensive and his advice and experience is frequently sought after for his breadth and detail, plus his knowledge of the people in the industry. His working experience includes key roles for NAB, IOOF, Morningstar, Managed Accounts, SFG Australia.

Adrian Vidotto, CFP - Partner, Strategic Wealth

Combining the right mix of expertise and know-how, Adrian is in tune with our clients' needs to ensure debt solutions represent the perfect fit.

A partner in Strategic Wealth, Adrian uses his 20 years of financial planning experience to help clients achieve their financial goals.

Adrian has completed a Bachelor of Business in Financial Planning and is a Certified Financial Planner.

Allan Whatmore - Founder & Chief Growth Officer, Growth Studio Agency (GSA)

Allan brings new and quickly actionable insights to marketing financial service using his understanding of financial planning and business development.

He heads up GSA which is an integrated growth agency, expertly consolidating nine essential digital services to drive revenue growth and funds under management.

Prior roles focussed on business growth and include Shines Digital, VP of Marketing & IR at Electric Metals USA,TAL Australia, Channel Capital.

Beatrice Yeo, CFA - Strategist, Multi-Asset Strategies & Solutions Group, BlackRock Australasia

Beatrice Yeo, CFA, is a Strategist in the Multi-Asset Strategies & Solutions (MASS) Group, focusing predominantly on the Australian Model Portfolio Solutions business. She is based in Melbourne. Beatrice partners closely with the investment teams, consultants and research houses to deliver model portfolio solutions for clients in Australia. As a Strategist within the broader MASS Group, she is also responsible for providing insights on the broader MASS platform.

MASS is the investment group at the heart of BlackRock's portfolio construction, asset allocation, and active management ecosystem. MASS draws on the full toolkit of BlackRock's index, factor, and alpha-seeking investment capabilities to deliver precise investment outcomes and cutting-edge alpha insights. MASS constructs active asset allocation strategies and whole portfolio solutions across a wide spectrum of commingled funds, separate accounts, model portfolios, and outsourcing solutions in the wealth and institutional channels.

Brent Bevan - Head of Investment Consulting, Managed Accounts, MLC Asset Management

Brent has 20+ years' industry experience and joined MLC Asset Management in 2021 from Mercer, having previously spent 6 years with Commonwealth Bank, most recently as the Head of Research for the bank's multiple advice licensees.

He has also held various investment and research roles at Suncorp and Perpetual.

His current role involves leading a team of experienced investment professionals, providing investment consulting services to financial advice firms and licensees.

The team's focus is on leveraging MLC AM's multi-asset capabilities to develop and deliver bespoke managed account solutions to licensees and advice firms.

Chetan Trehan, MBA - Sector Head, Real Assets, Alternatives, & Multi-Asset Funds/ SMAs, SQM Research

Chetan is an investment professional with 18+ years of experience in the Australian financial services sector. He is immensely passionate about the capital markets and investments, and has worked in a variety of roles within the investment research / financial advice / wealth management sector.

Chetan has worked with Financial Advisers to develop investment portfolios for a broad range of clients, including retail clients, SMSF trustees, high net worth individuals, and retirees. The investment portfolios were tailored as per client requirements / objectives, and included unlisted Managed Funds and listed ETFs/Shares.

Chetan holds Masters in Business Administration (MBA) - Finance degree from University of Technology, Sydney (UTS), Australia. Chetan also holds a Bachelors' degree in Commerce (Honours degree), and has completed 4 modules of RG146/DFP.

Craig Emanuel - Managing Partner, Emanuel Whybourne & Loehr

Initially practising as a qualified Chartered Accountant and licensed tax advisor for 12 years, Craig's passion saw him transition from accounting into financial markets. With Craig's unique broad taxation and financial experience, Craig considers your family's total financial structures and position. This enables the most suitable investment portfolios to be created, managed, and monitored, to ensure wealth preservation for your future generations. Craig's clients benefit from his deep 30 + years of experience across global investment markets and economics, to shape the best advice possible from our holistic approach.

Before founding Emanuel Whybourne & Loehr, Craig held the title of Director at Macquarie Group from 2002 to 2008, then a Director of UBS until 2015. More recently Craig was an Executive Director of Morgan Stanley until 2020. During that time, Craig sat on the UBS National Advisory Council and the Morgan Stanley Financial Advisory Council. For three years in succession, Craig was ranked in the Global investment publication Barron's Top 10, Top 25 Investment Advisors in Australia.

Damon Riscalla - National Head of Practice Development, Betashares

Damon has over 26 years' experience working with financial planning practices,including some of Australia's leading financial planning firms. In his role, he helps financial advice practices develop, refine and implementprocesses to enhance value for their clients. Damon joined Betashares in 2017 and prior to taking on the Practice Management role established the Victorian office.

Damon holds a Diploma of Financial Planning, a Bachelor of Business, a Grad Dip in Applied Tax and Financial Planning, and a Bachelor of Law.

Daniel Vanderzeil - Head of Managed Accounts, CFS

Daniel Vanderzeil, based in Melbourne, VIC, AU, is currently a Head of Managed Accounts at Colonial First State, bringing experience from previous roles at BT Financial Group, BT and IOOF. Daniel Vanderzeil holds a 2020 - 2023 Master of Business Administration - MBA @ Melbourne Business School. With a robust skill set that includes Strategic Financial Planning, Investments, Wealth Management, Portfolio Management, Insurance and more, Daniel Vanderzeil contributes valuable insights to the industry.

Danny Wong - Manager Research, Alteris Financial Group

Danny Wong has over 20 years' experience analysing and reporting on investment markets.

During his time, Danny has covered managed funds research, direct equities analysis/modelling, and portfolio management.

He has a deep understanding of the Separately Managed Accounts (SMAs)/ Managed Accounts market and the creation of model portfolios for financial advice groups.

Currently, Danny works at Alteris Financial Group, as the Research Manager and is involved in helping oversee the investments in managed funds, equities and a range of unlisted assets.

David Bainbridge - Head of Governance, Lifestyle Asset Management

David Bainbridge, a Certified Financial Strategist, has been an integral part of Lifestyle Asset Management for over a decade, now serving as the Head of Governance.

With a Master of Business Administration from Sydney University, David brings a wealth of experience to the firm.

Prior to his role as a Financial Adviser, he spent over 40 years as a Chartered Accountant, accumulating extensive consulting and management expertise across various sectors, including finance, transport, manufacturing, retail, healthcare, and local and state government.

Duncan Smith, CPA - General Manager, Client Relationship Management (Melbourne), JANA

Duncan is responsible for ensuring JANA's high standards of services are consistently delivered to all clients, including achieving optimal client investment outcomes.

Since 2007, Duncan has been the lead consultant for clients across multiple client segments. Duncan has held several roles during his time at JANA including Head of Consulting, a senior member within the Australian Equities Research Team, former Head of Property Research Team and a member of the JANA Research Committee.

Before joining JANA in 2007, Duncan spent 12 years with the NAB Superannuation Fund as Assistant Fund Secretary and Finance Manager. Through Duncan's role at JANA and previous employment he has also held positions on Investment Committees and Advisory Boards.

Eleanor Menniti, CIMA - Associate Portfolio Manager, Multi-Asset Portfolios, Lonsec

Eleanor oversees the Tailored Portfolios at Scale (TPAS) offering within the Tailored Solutions team, and supports consulting clients to develop bespoke solutions for their practice.

Eleanor joined Lonsec in 2023 and holds 19 years' experience across consulting, manager selection, portfolio construction, as well as product development, governance and strategy.

Prior to joining Lonsec, Eleanor was a Director of Product Strategy at BlackRock and has also held roles at Macquarie Bank.

Eleanor holds a Bachelor of Business degree from UTS Sydney and is a Certified Investment Management Analyst (CIMA).

Gavin Fernandes - APAC Data & AI Partner Ecosystem Leader, IBM

Gavin is proud to lead the Partner Ecosystem for IBM Data and AI, across APAC and Greater China Group. Leading sales and programs that support hundreds of IBM Data & AI Partners who are putting technology to work in the real world, with real results, delivering value to clients with hybrid cloud Data and AI solutions and services. He provides focus to the APAC teams that deliver the support, resources, and technology that partners need to create innovations that matter for clients.

Gavin is an experienced Data and AI leader with 20+ years experience, with a track record of bridging the gap between Business and Technology to deliver transformation outcomes for clients. An experienced presenter and an Evangelist for IBM's Data and AI offerings. Always on stage at local and APAC IBM client and partner marketing events in additional to internal sales enablement and new hire onboarding.

Julian Lefcovitch - Senior Product Manager, Managed Portfolios, North

Julian is a wealth management product specialist with 13+ years of experience in product and platform strategy, development, management and rationalisation.

He leads the MyNorth Managed Portfolio product team, and has helped double Funds Under Management year on year to reach $11 bn today.

Julian has a passion for delivering innovative solutions using digital and emerging technologies to help advisers embed scalable product solutions that improve practice efficiency and reduce cost to serve.

He holds a Bachelor of Commerce (BCom), with a Finance and Management Major and a Kaplan Diploma of Financial Planning Diploma of Financial Planning

Kyle Lidbury, CFA - Head of Investment Research, Perpetual Private

Kyle leads the Investment Research team, and is responsible for the overall investment solutions of the firm, managing teams of highly experienced investment professionals across capital markets research, asset allocation, manager research, stock analysis and portfolio construction advice, as well as portfolio analytics and investment insights for client portfolios.

Prior to this role, he was General Manager - Research & Operations for Perpetual Investments, where he managed key ratings house relationships and maximised rating outcomes across all funds and asset classes.

Kyle earned his Bachelor of Accounting with Distinction from the University of Technology, Sydney, and also holds the Chartered Financial Analyst designation, Chartered Alternatives Investment Analyst designation and is a Certified Practising Accountant.

Leah Sciacca - Senior Executive Leader, Financial Advice & Investment Management, ASIC

Leah leads ASIC's Financial Advice and Investment Management team within the Regulation and Supervision group. The team oversees the regulatory work associated with financial advisers, advice licensees, managed investment schemes, wholesale funds, platforms and managed discretionary accounts. Prior to this role, Leah was ASIC's Senior Executive Leader, Financial Advisers.

Leah has more than 13 years of regulatory experience and has worked on significant policy and enforcement initiatives.

Leah is focused on improving access to good quality affordable advice and working to address conduct in the advice and investment management sectors that leads to poor consumer outcomes.

Prior to joining ASIC, Leah was a practising financial adviser for over 10 years, representing several Australian financial services licensees and providing personal advice to retail clients.

Matt Hattersley - Head of Dealer Group Engagement, SQM Research

Matt joined SQM Research in 2020 with over 25 years of experience in working with and supporting the financial planning community across Australia.

Prior to joining SQM Research, Matt represented several major investment managers in the Australian market. In his roles with these companies, he supported and engaged with the broader financial advice community ranging from administration platforms and dealer groups to individual advice businesses.

Martin Morris - Chief Client Officer, Centric

Martin has 34 years of Financial Services experience, joining the industry as a trainee Business Development Manager in London.

Passionate about the industry, Martin has since that time held senior roles in Distribution, AFSL Management, has non-executive Director experience and in recent years was a Director of Praemium, Australia, leading the company's Sales and Marketing Divisions as a member of their Executive team. He has also spent time working within advice businesses, including his own, and held the CEO role of an SMSF administration and technology business. This experience has allowed Martin to build his knowledge and expertise in client engagement and strategic planning and working with financial advisers to build engaged and profitable clients.

Immigrating to Australia in 2000, Martin has, and always, challenges his knowledge and experience and searches for new ways to learn and add value. As such, he has undertaken his MBA, is a graduate of the Australian Company Directors Course and is a certified Behavioural Sales Coach through the US based Management Research Group.

Michael Karagianis - Senior Consultant, JANA Investment Advisors

Michael heads up an investment consultancy focused on providing advised and implemented solutions to financial advisors.

Prior roles include: Head of Private Investment Consulting at NAB Asset Management, CEO - MC Asset Management, Head of Asset Allocation & Investment Strategy AUS - UBS Global Asset Management, AMP Capital.

He holds an Economics degree from Adelaide University.

Michelle Krig - Director, State Leader NSW, Colonial First State

A strategic & successful business development leader with a proven track record of exceeding organisational targets for over 10 years. I lead, motivate and inspire my team through providing exciting personal development opportunities, feedback and meaningful support so that they can bring the best versions of themselves to work every single day. I love working with financial advisers, small to medium business owners, dealer groups and large institutions to challenge their business models and help them deliver better wealth outcomes and experience for their clients.

Paul Benson, CFA, CAIA - Head of Systematic Fixed Income, Insight Investment

Paul has 30 years' experience in the investment industry. He joined BNY Mellon Investment Management affiliate, Mellon Investments, in 2005 and has been Head of the Systematic Fixed Income Team since 2015. In September 2021, Mellon Investments' fixed income strategies, including the Systematic Fixed Income Team, formally joined Insight.

Based in San Francisco, Paul and his team of portfolio managers, researchers and traders pioneered the development of highly implementable systematic fixed income strategies by combining innovative model-driven alpha research with cutting-edge trading technology. Before becoming Head of the Systematic Fixed Income Team, Paul was a senior portfolio manager responsible for the yield curve arbitrage strategy within global asset allocation portfolios.

Ramana Mysore - Co-founder and CTO, DataSenz

Ramana has extensive experience and knowledge in software development, Design and Architecture. He has worked at big multinationals, medium enterprises and start-ups including Philips healthcare, DB Schenker and Blackbaud.

Ramana leads the Product development and Professional services teams at DataSenz and enjoys working with other Developers and Analysts.

In the Financial planning sector, Ramana has led and implemented several productivity improvement solutions for several clients including Philo Capital, Kabel, AdviseWise, Wealth Partners, etc. using the technology stack from Microsoft Power platform and D365 and IBM AI and Automation - Watsonx.

Rugby Kliousis - Business Development Manager, Insight Investment

Rugby joined Insight in May 2024 as a Business Development Manager, responsible for continuing to build insight's institutional business in Australia & New Zealand, whilst expanding relationships within the private wealth sector. Prior to Insight, Rugby spent three years at Shed Enterprises as a Business Development Manager focussing on the distribution of offshore wholesale and retail funds within the institutional and private wealth sectors within Australia and New Zealand. Rugby started his career in finance at CMC Markets as a Client Service Executive, providing regular market insights and training to high valued clients. Rugby holds a Bachelor of Business & Commerce in International Business & Commerce from the University of Newcastle and a Masters of Real Estate Investments from the University of Technology Sydney.

Sarah McCarthy CFP - Head of Research Services, AMP Investments

Sarah leads a team of research experts responsible for developing and executing a highly valued and competitive research service offer for the AMP Advice network. Sarah has been with the AMP Group for the last 15 years having also worked in the advice team, as a Strategic Account Manager & Business Manager across all three aligned licensees and Jigsaw Support Services. In addition to her current role, Sarah is a Responsible Manager for AMP Financial Planning, Hillross Financial Services & Charter Financial Planning AFSLs.

Prior to joining AMP, Sarah was a senior financial planner for a large self-licensed multi-disciplinary professional practice in Adelaide. With over 24 years in financial services, Sarah has developed extensive knowledge and skills in licensee management, investments, and advising clients, business owners and financial planners. Sarah holds qualifications in Financial Planning, Mortgage Broking and is a Certified Financial Planner CFP® Professional of the Financial Adviser Association of Australia.

Ty Cockle - CEO & Financial Adviser, Financial Foundations Australia

Ty is the CEO, director and shareholder of Financial Foundations Australia (FFA). As CEO, Ty is responsible for the strategic direction of the business. Ty has cultivated a highly qualified and accountable team at FFA and is committed to ensuring the team at FFA are well resourced for the provision of high-quality financial advice.

Ty's dedication to developing a business that provides precise, consistent, yet tailored advice, ensures all clients receive exceptional service.

Ty has a Bachelor of Education, Advanced Diploma of Financial Planning and is a Certified Financial Planner (CFP), the profession's highest practitioner qualification. He has also completed the Leadership Executive Program at The Wharton School in the USA and the Organisational Leadership, Innovation and Client Centricity Program at INSEAD Business School in Singapore.

Additional qualifications and memberships held by Ty include; the Self-Managed Superannuation Specialist Adviser (SSA) designation which is recognised to be the leading superannuation advisor qualification in the industry; a member of the Financial Advice Association Australia (FAAA); and is a Retirement Planning and Aged Care specialist.

Uwe Helmes, CFA - Lead Strategist, Multi-Asset Strategies & Solutions Group, BlackRock Australasia

Uwe Helmes, CFA, is the Lead Strategist for the Model Portfolio Solutions business in Australia and a Strategist in the Multi-Asset Strategies & Solutions (MASS) Group.

The MASS team is the investment group at the heart of BlackRock's portfolio construction, asset allocation, and active management ecosystem. MASS draws on the full toolkit of BlackRock's index, factor, and alpha-seeking investment capabilities to deliver precise investment outcomes and cutting-edge alpha insights. MASS constructs active asset allocation strategies and whole portfolio solutions across a wide spectrum of commingled funds, separate accounts, model portfolios, and outsourcing solutions in the wealth and institutional channels. In his role, Mr. Helmes leads the product strategy function for Model Portfolio Solutions for financial advisers and intermediary platforms in Australia.

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