



IMAP ADVICE IN ACTION 2024

DIGITALISATION & CLIENT CENTRIC ADVICE

#AIA2024

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AGENDA

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MELBOURNE 23 JULY 2024



SCAN QR CODE TO
ACCESS MATERIAL

A silhouette of a surfer in a black wetsuit riding a large, curling wave. The surfer is positioned in the lower center of the image, with their arms outstretched for balance. The wave is a deep teal color with white foam at the crest.

Centric[©]

PRINCIPAL ADVICE
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Time	Topic	Presenters
8.30am	Introduction	Toby Potter (IMAP) Mike Pope (MC) (La Vista Licensee Solutions)
8.40am	The AI Tech stack	Gavin Fernandes (IBM)
8.55am	Pitfalls and Opportunities of Outsourcing	Brent Bevan (MLC Asset Management) Kyle Lidbury (Perpetual Private) David Bainbridge (Lifestyle Asset Management) Moderator: Toby Potter (IMAP)
9.25am	Rest in Peace QE, enter the golden age for bonds	Paul Benson (Insight Investment) Rugby Kliousis (Insight Investment)
9.55am	Break	
10.25am	Real life examples of practices having implemented Managed Accounts on a scale	Daniel Vanderzeil (CFS) Ty Cockle (Financial Foundations Australia)
10.55am	Practice Development Tools to Support your SMA journey	Damon Riscalla (Betashares)
11.25am	Portfolio Customisation - the Problem, the Solution and the Benefits	Beatrice Yeo (Blackrock) Julian Lefcovitch (North) Eleanor Menniti (Lonsec) Moderator: Sarah McCarthy (AMP Investments)
11:55	Break	
12.15pm	How AI is used in Advice	Ramana Mysore (Datasenz)
12.30pm	Lunch Keynote: Building a Digital First Business	Martin Morris (Centric)
1.00pm	Accommodating Illiquid Assets for your client	Adrian Vidotto (Strategic Wealth) Duncan Smith (JANA Investment Advisers)
1.30pm	What it Takes to be a Superior Rated Managed Account – and Why it Matters	Chetan Trehan (SQM Research) Matthew Hattersley (SQM Research)
2.00pm	Closing Remarks	Toby Potter (IMAP)

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