



IMAP ADVICE IN ACTION 2024

DIGITALISATION & CLIENT CENTRIC ADVICE

#AIA2024

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AGENDA

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SYDNEY 25 JULY 2024



SCAN QR CODE TO
ACCESS MATERIAL

A silhouette of a surfer in a black wetsuit riding a wave, positioned in the lower center of the image. The background is a high-angle, teal-toned photograph of a large ocean wave with white foam.

Centric[®]

PRINCIPAL ADVICE
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Time	Topic	Presenters
8.40am	Introduction	Toby Potter (IMAP) Mike Pope (MC) (La Vista Licensee Solutions)
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	The role of advisers in monitoring underperformance	Leah Sciacca (ASIC)
9.55am	Break	
10.25am	Real life examples of practices having implemented Managed Accounts on a scale	Michelle Krig (CFS) Frances Taylor (CFS)
10.55am	Practice Development Tools to Support your SMA journey	Damon Riscalla (Betashares)
11.25am	Portfolio Customisation - the Problem, the Solution and the Benefits	Uwe Helmes (Blackrock) Julian Lefcovitch (North) Eleanor Menniti (Lonsec)
11:55	Break	
12.15pm	Optimising client engagement	Allan Whatmore (Growth Studio Agency)
12.30pm	Lunch Keynote: Building a Digital First Business	Martin Morris (Centric)
1.00pm	What it Takes to be a Superior Rated Managed Account – and Why it Matters	Chetan Trehan (SQM Research) Matthew Hattersley (SQM Research)
1.30pm	Accommodating Illiquid Assets for your client	Danny Wong (Alteris) Michael Karagianis (JANA Investment Advisers)
2.00pm	Closing Remarks	Toby Potter (IMAP)

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