Advisory Speak

SIFA

2022 Conference

COPTHORNE HOTEL AND RESORT

QUEENSTOWN LAKEFRONT

Wed 24th – Fri 26th August 2022

WED 24	**19.00**	Dinner ***Botswana Butchery – 17 Marine Parade, Queenstown (upstairs)***
THU 25	**08:30**	Conference start – Welcome and House Keeping ***Ross Sheerin***
	08:45	Client Communication in Volatile Markets. ***Jim Parker, Vice President - DFA Australia*** Pandemics, wars, inflation: In these times, the value of advice has never been greater. And the key to successful advice is clear communication that recognises how clients are feeling, speaks their language and focuses their attention on what they can control. In this presentation, former journalist and funds management professional Jim Parker show you how to build a highly effective communication strategy for any climate.
	10:00	Morning tea
	10:30	Navigating the Retirement Maze ***Paddy McCrudden – Head of Retirement Solutions & Data Science, Magellan***
	11:15	Castle Point Funds Management
	11:30	Governance, business resilience, 3rd party contracts. ***Karty Mayne - Rosewill Consulting*** Considering the issues, pitfalls and best practices post FAP
	12:30	Lunch
	13:30	The Financial Services Industry Has Made Money Boring ***Adam Ferrier*** People love money, and all things it can do for them. Money is sexy, liberating and fun. However, the financial services industry has disconnected people from their money. We have done the impossible and made it boring, opaque, and difficult to understand. If we better understand the psychology of money, we can better help our clients.
	14:30	Climate Change – The Contested Science or Fraud of the 21st Century ***Richard Reaney***
	15:30	Afternoon tea – Bar open 3:30 – 5:30pm
	16:00	Devon Funds Management
	16:15	PMG Funds
	16:30	Harbour Asset Management
	16:45	Retirement Policy and Research Centre – retirement update ***Chaired by Dr Claire Dale***

17:00	Panel Discussion – decumulation in today's world ***Chaired by Dr Claire Dale***
19:00	Dinner ***Skyline restaurant – 53 Brecon Street, Queenstown***

FRI 26

8:30	Media and Information Hygiene. ***Jim Parker, Vice President – DFA Australia*** New Zealanders kept safe in pandemic by observing rules around hygiene and social distancing. But what about their media consumption? Unreliable, distorted and manipulative information is rife on the web, often tempting your clients into bad financial decisions. In this insightful presentation, Jim provides a vital guide to information hygiene and the critical role of trusted advice
9:30	Kernel Wealth
9:45	Milford
10:00	Mint Asset Management
10:15	Platinum Asset Management
10:30	Morning tea
11:00	Main Topic TBC ***Speaker(s) TBC***
11:45	The Science of Regret. ***Ben Brinkerhoff, Head of Advice – Consilium*** Researchers and palliative care therapists have explored recently the regrets that most affect us as human beings. In this session we'll explore the research to understand in advance which type of regret affects us most, and how we can use our money and time and planning to do something about it, before it's too late.
13:00	Lunch
13.45	Nikko Asset Management
14:00	Dimensional
14:15	Generate KiwiSaver
14:30	Reserve Bank of New Zealand Update ***Christian Hawkesby, Deputy Governor /General Manager Financial Stability RNBZ***
15:30	**Conference end**

Introducing our keynote speakers

Christian Hawkesby

Christian has been with Te Putea Matua since 2019. Prior to his appointment as Deputy Governor/General Manager Financial Stability Group, Christian was the Assistant Governor and General Manager of Economics, Financial Markets and Banking. Christian was also part of the team that established Harbour Asset Management, which was awarded Morningstar New Zealand Fund Manager of the Year in 2014, 2016 and 2017.

Before this, Christian spent 9 years at the Bank of England, where he held senior positions including Private Secretary to the Deputy Governor, Chief Manager of Sterling Markets and Head of Market Intelligence. Christian graduated from the University of Canterbury with a Master of Commerce (Hons) majoring in Economics.

Dr M. Claire Dale

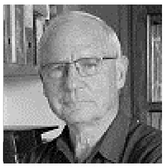
Dr M. Claire Dale is Research Fellow with the Retirement Policy and Research Centre in the University of Auckland Business School where she completed a PhD. Her research interests include decumulation and retirement incomes, the tax and welfare interface, pension portability, longevity risk, and intergenerational equity. She is engaged in policy development toward solutions to the escalation of pension, health and care costs resulting from New Zealand's ageing population.

Claire founded action research project Ngā Tāngata Microfinance Trust in 2010 which partners with financial mentors, and with loan capital from Kiwibank offers fee- and interest-free small loans to people on low incomes to promote financial capability and social justice.

Jim Parker

Based in Sydney, New Zealand-born-and-raised Jim Parker is regional director of communications with asset manager Dimensional Fund Advisors. His role involves writing and presenting for a broad audience the principles of sound investment. Previously, Jim spent a quarter of a century in journalism in New Zealand, Australia, Asia and the UK, specialising in financial markets and economics.

Jim is a graduate in economic history from Deakin University, Geelong and in journalism from Auckland University of Technology.



Richard Reaney

Richard has studied Climate Cycles and changes for 30 years. He holds a post-graduate qualification in Antarctic Studies from Canterbury University. Richard has been to the Antarctic on many occasions for work and research and was awarded the Visting Scholarship to Scott Polar Research Institute, Cambridge University in 2005. Richard led an expedition in 1996 to Canadian Arctic to study ice core samples and reached North Magnetic Pole whilst there. Richard has also worked with British Antarctic Survey on South Georgia.

Paddy McCrudden

Paddy is Head of Retirement Solutions and Data Science at Magellan Asset Management Limited. Paddy McCrudden joined Magellan in 2017 as the Head of Retirement Solutions and Data Science. Before that, Paddy worked for 16 years at BlackRock. From 2015 to 2017, Paddy was based in New York where he led a team building quantitative models for global equities and worked as a lead strategist for active equities. Between 2010 and 2015, Paddy was the head of portfolio management for Australian equities based in Sydney, overseeing index, active and long-short funds. Between 2001 and 2010, Paddy was a portfolio manager and trader in a team responsible for multi-asset portfolios.

Prior to the finance industry, Paddy worked as a lecturer in pure mathematics at McGill University in Québec and Macquarie University in Sydney. Paddy earned a CFA in 2005 and holds a Bachelor of Science (hons) from Sydney University and a Ph.D. in pure mathematics from Macquarie University.

Adam Ferrier

Adam is a multi-award-winning advertising creative and founder of the agency Thinkerbell. He is also a leading Australian consumer psychologist, an expert brand strategist, and an authority on Behavioural Economics. Adam is a registered psychologist, was a Strategic Planner for Saatchi & Saatchi