

Advisory Speak



2022 Conference

COPTHORNE HOTEL AND RESORT
QUEENSTOWN LAKEFRONT

Wed 24th – Fri 26th
August 2022

WED
24
THU
25

19:00

Dinner

Botswana Butchery – 17 Marine Parade, Queenstown (upstairs)

08:30

Conference start – Welcome and House Keeping

Ross Sheerin, Chairman of SIFA

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 will show you how to build a highly effective communication strategy for any climate.



10:00

PMG Funds

10:15

Kernel Wealth

10:30

Morning tea

11:00

Navigating the Retirement Maze

Matthew Webb, Head of Strategy, Asset Management, Magellan

How do you maintain ready access to your savings and invest to receive a regular and predictable income that keeps pace with inflation, without eroding your capital? Matthew will discuss why it is challenging to meet investment goals in retirement and how to rise to that challenge. In particular, he will discuss the strengths and weaknesses of several approaches to the use of equities in retirement, including portfolio construction, options, and bucketing.

11:45

Castle Point Funds Management

12:00

Governance, business resilience, 3rd party contracts.

Karty Mayne, Rosewill Consulting

Considering the issues, pitfalls and best practices in the new regime and post full licence.



13:00

Lunch

14:00

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.

15:00

Climate Change – The Contested Science or Fraud of the 21st Century

Richard Reaney

For many years, we have been led to believe the Earth is heating due to human-induced climate change. But the literature surrounding climate change is enormous, diffuse and profoundly contradictory. In an environment where many politicians, journalists, scientists, and green activists claim to know all the answers, are we being greenwashed through distorted or altered data to provide the desired outcome?



16:00

Afternoon tea – Bar open to bring drinks back

16:15

Retirement Policy and Research Centre Update

Dr Claire Dale



- 16:30** Panel Discussion – decumulation in today’s world
Chaired by Dr Claire Dale with a panel of Charlene Overall, Ben Brinkerhoff, Matthew Webb and David Boyle
- 19:00** Dinner
Skyline restaurant – 53 Brecon Street, Queenstown
- 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 presentation, Jim provides a vital guide to information hygiene and the role of trusted advice.
- 9:30** Devon Funds
- 9:45** Milford Asset Management
- 10:00** Harbour Asset Management
- 10:15** Platinum Asset Management
- 10:30** Morning tea
- 11:00** The future of advice
Katrina Shanks, CEO of Financial Advice NZ, and Marisa Broom CFP, ex-Chair of the Financial Planning Association, Australia
- We are all familiar with the new laws governing financial advice in New Zealand but looking ahead, what is next? More regulation, further education, and governance requirements? Katrina and Marisa will provide their views on what the future of financial advice in New Zealand may look like?
- 11:45** The Science of Regret.
Ben Brinkerhoff, Head of Advice – Consilium
- Researchers and palliative care therapists have recently explored 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 plan to do something about it before it’s too late.
- 13:00** Lunch
- 13:30** Nikko Asset Management
- 13:45** Generate KiwiSaver
- 14:00** Reserve Bank of New Zealand Economic Update
Christian Hawkesby, Deputy Governor/General Manager Financial Stability RNBZ
- 15:00** Conference close

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 40 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 from 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.



Adam Ferrier

Adam is a multi-award-winning advertising creative and founder of the agency Thinkerbell. He is 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.



Matthew Webb

Matthew has worked in asset management for over 25 years, and joined Magellan in May 2007. At Magellan, Matthew has held a variety of senior roles and has worked with institutional investors across Asia-Pacific and the United States together with the wealth management community in Australia & New Zealand. Matthew is responsible for determining the strategy of the firm's asset management business and works with Magellan's investment team and the firm's client base to find investment solutions to unmet needs. Matthew holds a Bachelor of Economics from the University of Western Australia and a Graduate Diploma in Applied Finance and Investment from the Financial Services Institute of Australasia. He is a CFA Charterholder and lectured for Kaplan Professional in Applied Finance at both graduate and post-graduate level for more than 10 years.



Marissa Broom

Marisa is the ex-Chair of the Financial Planning Association of Australia (FPA), having been a Director for the last six years. Marisa is a member of the Advisory Board for the Conexus Institute, and the Chair of the Regulatory Advisory Panel of the Financial Planning Standards Board.



Katrina Shanks

Katrina has been the CEO of Financial Advice NZ for four years and is extremely excited about the opportunities for the sector and influencing more New Zealanders seeking quality financial advice to increase their financial health, wealth and wellbeing.

Katrina has spent much of her career in financial services. A Chartered Accountant by trade, Katrina started her career in Audit, spent time at Newton Fund Management in London and then joined Westpac Trust. Katrina has a deep understanding of the legislative process and how to influence policy development, drawn from her experience as a two-term Member of Parliament. During that time, she chaired Select Committees and was a member of the Commerce Select Committee during the significant legislative changes in the financial services sector.



Ben Brinkerhoff

Ben is Head of Advice and has been with Consilium since the foundation of the business. Ben is responsible for Consilium Partner Services and business development and sits on the Consilium Investment Committee.

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