FSC FINANCIAL SERVICES COUNCIL

# SHAPING ADVICE

**SUMMIT** 30 JULY 2026 **SYDNEY**

## EVENT PROGRAM

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# PROGRAM

The Financial Services Council is the leading voice of Australia's wealth and financial services sector, driving the conversations that shape the industry.

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| 8.15am | Registration, coffee and refreshments |
| 9:00am | **Conference Opening**<br>• Blake Briggs, CEO, Financial Services Council |
| 9:10am | **KEYNOTE: The State of Advice: Demand, Capacity and Growth**<br>• Andrew Inwood, Founder & Principal, CoreData |
| 9:25am | **The Structural Shift: Why Investors Are Backing the Future of Advice**<br>• Paul Barrett, Group CEO, AZ Next Generation Advisory<br>• Matt Fogarty, EGM Advice Partnerships, infocus<br>• Andrew Inwood, Founder & Principal, CoreData<br>• **Chair: Edwina Maloney, Group Executive, Platforms, AMP** |
| 10:00am | **KEYNOTE & FIRESIDE CHAT: The Hon. Tim Wilson MP, Shadow Treasurer**<br>• The Hon. Tim Wilson MP, Shadow Treasurer<br>• **Chair: Blake Briggs, CEO, Financial Services Council** |
| 10:30am | Morning Tea |
| 11:00am | **Australia's Advice Gap: The Unmet Need**<br>• Matt Brown, CEO, Fortnum and Personal Financial Services<br>• Adrian Gervasoni, Executive Manager Advice Services, Industry Fund Services<br>• Andrew Gregory, Chief Advice Officer, UniSuper<br>• Jason Hoang, CEO, InvestStream<br>• **Chair: Chris Weldon, Chief Transformation Officer, MUFG Pension & Market Services** |
| 11:40am | **Navigating the New Tax Landscape: Implications of Federal Budget Changes**<br>• Bryan Ashenden, Head of Financial Literacy & Advocacy, BT Financial Group<br>• Daniel Shrimski, Managing Director, Asia Pacific, Vanguard<br>• Geoff Wilson AO, Chairman & CIO, Wilson Asset Management<br>• **Chair: Keith Cullen, CEO, WT Financial Group** |
| 12:20pm | **FIRESIDE CHAT: ASIC**<br>• Alan Kirkland, Commissioner, ASIC<br>• **Chair: Blake Briggs, CEO, Financial Services Council** |
| 12:50pm | Lunch |
| 1:40pm | **NMG Research: The Impact of Superannuation Choice on Retirement Outcomes**<br>• Lachlan Reardon, Partner, NMG Consulting |

# PROGRAM

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| 1:50pm | **Targeted Reform, Better Outcomes: An Industry-Led Response**<br>• Andrew Alcock, CEO, Hub24<br>• Lachlan Reardon, Partner, NMG Consulting<br>• Kate Farrar, CEO, Brighter Super<br>• Neil Younger, Group CEO, Entireti<br>• **Chair: Chaneg Torres, Executive Director, Policy, Financial Services Council** |
| 2:30pm | **Platforms, Providers and the Value Chain: The Evolving Role of Platforms**<br>• Matt Heine, CEO & MD, Netwealth<br>• Renee Howie, Chief Customer Officer, Insignia<br>• Recep Peker, Managing Director, SuitabilityHub<br>• Darren Pettiona, Executive Director Strategy, Dash<br>• **Chair: Blake Briggs, CEO, Financial Services Council** |
| 3:10pm | Afternoon Tea |
| 3:30pm | **Building Trust in an AI World: Four Crucial Lessons from Industries Leading Technological Change**<br>• Nigel Dalton, Technology Advisor & Evangelist, Thoughtworks<br>• Manu Iyer, Director & Industry Head, BFSI APAC, Thoughtworks<br>• **Chair: Sam Wall, CEO, Wealth, Iress** |
| 3:55pm | **Managed Accounts: Growth, Governance and Regulatory Expectations**<br>• Kristine Goodwin, Director Growth & Wealth Distribution, AMP<br>• Grant Hackett OAM, Group CEO, Generation Development Group<br>• Matt Lawler, CEO, Akumin<br>• **Chair: Sarah Brennan, Chair & Non-Executive Director** |
| 4:40pm | **Event Close** |
| 5:00pm | Networking Drinks |

Download our white paper on the

**"Future of Advice Licensing"**

fsc.org.au/events

# Many thanks to our event table partners

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## Get involved in today's event

Scan the QR code to join Slido and submit your questions

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