



Investment Administration CONFERENCE

February 18, 2015 | The Ivy Ballroom, Sydney

REGISTER NOW

- 9.00 **Welcome**
Colin Tate, chief executive, **Conexus Financial**
- 9.05 **Opening Remarks**
Host
Leigh Sales, anchor, 7.30 Report, **ABC TV**
- 9.15 **Preparing for growth – opportunities and challenges on the horizon**
As funds grow and membership needs change, platforms and investment technology must also evolve. What is best practice for fund investment operations in technology and systems today, and where do opportunities exist for funds to become slicker, smarter and more efficient in the near future?
- **Peter Curtis**, head of investment operations, **AustralianSuper**
 - **Melinda Howes**, general manager superannuation, **BT**
 - **Stephen Huppert**, partner, **Deloitte**
 - **David Rhind**, solution manager, SS&C Anova Performance, **SS&C HiPortfolio & Anova**
 - **Chair: Leigh Sales**, anchor, 7.30 Report, **ABC TV**
- 10.05 **The ideal investment operations model – what does it look like?**
What is the ideal operations model for your superannuation fund? What roles should be outsourced and what should be performed internally. This session will bring together insights from large, mid-tier and small funds to explore all facets of the debate surrounding the ideal investment operations model.
- **Lounarda David**, investment operations manager, **Sunsuper**
 - **Peter Rowe**, chief operating officer, **Vision Super**
 - **Naresh Subramaniam**, head of investment services – asset servicing, **National Australia Bank**
 - **Joe Youssef**, investment manager, operations, **Cbus**
 - **Chair: Leigh Sales**, anchor, 7.30 Report, **ABC TV**
- 10.55 **Morning tea**
- 11.15 **Investment operations as a source of revenue**
Some super funds today are using their middle office to not only perform analysis and compliance, but as a revenue generator for maximising portfolio efficiency, securities lending and class action claims. For some this means that revenue can meet the costs of large operations. This session will look at key ways in which investment operations can add value to the business, rather than just operating as a cost centre.
- **Peter Curtis**, head of investment operations, **AustralianSuper**
 - **Phil Garrett**, managing director, head of securities finance, Australia & New Zealand and head of strategy and business development for securities finance, Asia, **State Street**
 - **Jonathan Green**, general manager investments, head of investment management, **New South Wales Treasury Corporation**

- **Brian Slade**, director of sales and relationship management, Australia and New Zealand, **Goal Group**
- **Chair: David Rowley**, editor, **Investment Magazine**

12.05 **How better data can save your fund money**

Could your data analysis and data capture be more efficient, more cost effective? Could they identify cost savings and investment opportunities across your fund? This session will look closely at the business benefits that can be derived from the effective utilisation of increasing data volumes.

- **Campbell McCulloch**, head of investment operations, **Future Fund**
- **Mark Neary**, managing director, Asia Pacific, **Milestone Group**
- **Clare Tam**, chief information officer, **VicSuper**
- **Chair: Leigh Sales**, anchor, 7.30 Report, **ABC TV**

12.50 **Lunch – featuring keynote panel session: Super 3.0**

This session, held over lunch, will bring together thought leaders from across the industry to explore the future of superannuation in Australia over the next 30 years. We will be welcoming panelists to respond as if designing the system today with a blank sheet of paper. Key questions may include: what should the system look like, should superannuation be mandated, and how can bi-partisan support be gained?

Introduction:

Rohan Singh, chief executive, **Northern Trust Australia**

Panelists:

- **Ian Silk**, chief executive officer, **AustralianSuper**
- **Nicole Smith**, chair, **MLC Superannuation Fund**
- **Garry Weaven**, pioneer of industry funds
- **Chair: Leigh Sales**, anchor, 7.30 Report, **ABC TV**

14.20 **Optimal ways of meeting regulatory compliance**

What level of resource do funds need to fully meet APRA compliance? This session will discuss the ideal level of internal resources, the communication with trustees and the level of support from providers needed to efficiently comply with new regulation.

- **John Creeley**, chief financial officer, **First State Super**
- **Robyn McMahon**, general manager, diversified institutions division, **APRA**
- **Drew Vaughan**, owner, **Dymond, Foulds & Vaughan**
- **Chair: Leigh Sales**, anchor, 7.30 Report, **ABC TV**

15.05 **Performance reporting and analytics**

This session will explore the new types of tools being used for performance reporting and analytics. It will look at the ways the data produced can be interpreted, particularly in a post-tax performance reporting environment.

- **Emma Joneski**, senior investment analyst, **Christian Super**
- **Scott Lawrence**, managing director, **Lawrence Investment Consulting**
- **Kyle Ringrose**, head of investment operations, **Qsuper**
- **Chair: Leigh Sales**, anchor, 7.30 Report, **ABC TV**

15.50 **Afternoon tea**

16.10 **Getting the most from your custodian**

Custodians can offer commoditised services, but for a complex fund to gain full benefit, funds need to work closely with their custodian to achieve a more tailored solution. In this session, a custodian and a superannuation fund will discuss how this evolving relationship can work.

- **Paul Abraham**, senior manager, investment operations, **CSC**
- **Angelo Calvitto**, head of sales & marketing, **Northern Trust Australia**
- **Chair: Leigh Sales**, anchor, 7.30 Report, **ABC TV**

16.50 Digital disruption and Moores' law – the frightening future

This thought provoking session will explore the power of information technology to enhance and disrupt the world as we know it today. Renowned futurist Dr Keith Suter will discuss the likely impact on social, financial and business structures as advancements in information technology reshape the world in the next 20 years.

- **Dr Keith Suter**, futurist and managing director, **Global Directions Thinktank**

17.45 Close of conference

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