

4TH WOMEN IN SUPER & WEALTH MANAGEMENT LEADERSHIP SUMMIT

SUPERCHARGE YOUR LEADERSHIP
POTENTIAL TO CONFIDENTLY
NAVIGATE CHANGE

10 - 13
SEPTEMBER

PRIMUS HOTEL
SYDNEY

LEARN FROM



Vicki Doyle
Chief Executive
Officer



Sally Loane
Chief Executive
Officer



Carolyn Holmes-
Hannaford
Regional Director &
Vice President



Michael Dundon
Chief Executive
Officer



Katie Docherty
Chief Operating
Officer, Retail Banking
& Wealth Management



ALSO FEATURING



EVENT PARTNERS



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LEAD THROUGH CHANGE

As a consequence of the Royal Commission, uncertainty about the future has grown across the industry. So how can you lead your team through turbulence and come out the other side stronger than ever?

It begins with investing in your potential and building a strong foundation of crucial leadership skills.

Join some of Australia's most accomplished Super and Wealth Management leaders as they reflect on their leadership journeys and share practical advice for career progression. You'll gain the tools to excel as a leader - no matter what's thrown your way.

- **Develop** your distinct leadership profile
- **Build** the resilience to thrive through turbulent times
- **Nurture** high-performing, adaptive teams
- **Empower** future female leaders

BOOK NOW

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WHO WILL ATTEND?

Current, aspiring and future leaders in the Superannuation and Wealth Management sector in roles including:

- CEOs
- Directors
- Managers
- Team Leaders
- Advisors
- Analysts

WHAT OUR DELEGATES ARE SAYING

"I would completely recommend this. I have come away inspired and with renewed energy. I have clarity of what I need to do next, and the confidence to take a risk and do it."

- Consultant, Research Support, NAB

"It opened my eyes to think of things in another way, how to approach my leadership journey and believe in my strengths"

- Operations Manager, Telstra Super

11 SEPTEMBER SUMMIT DAY 1

ACHIEVE YOUR LEADERSHIP DREAMS

KEYNOTE

9:00 - 9:50

Great leadership starts with self-awareness. Identifying your unique strengths and incorporating them into your leadership style can help you stand out from the crowd.

Vicki Doyle

Chief Executive Officer

Rest Super



INVEST IN YOUR SUCCESS

CASE STUDY

9:50 - 10:40

Being agile and adaptive are critical leadership abilities. Carolyn will share her story and learnings from various industry changes, including the value of being dynamic to stay ahead of the curve.

Carolyn Holmes-Hannaford

Regional Director & Vice President

Dimensional Fund Advisors



JOB SHARING - THE POWER OF TWO

CASE STUDY

11:00 - 11:40

Flexible working can be a fantastic solution to mastering a healthy work-life balance. These job-sharing CEOs will share their story of how they have made this work for them, their team, and their organisation.

Lucy Foster Joint Chief Executive Officer

Catherine Van der Veen Joint Chief Executive Officer

Generation Life Limited



LIFT AS YOU LEAD

CASE STUDY

11:40 - 12:30

Managing and mentoring an agile team is a tricky task. To empower the next generation of leaders, you must understand the importance of supporting your team and helping them thrive.

Michael Dundon

Chief Executive Officer

VicSuper



OVERCOME IMPOSTOR SYNDROME

PANEL

1:30 - 2:30

Whether it's moving into a senior role, changing organisations, or leading a new team - leadership can be daunting. Our panel will share their experiences of feeling like an impostor and the ways they have taken ownership of their success to overcome this.

Rebecca Pope

Head of Intermediary

Vanguard Investments



Sophie Dodson

Executive Director

Goldman Sachs Asset Management Australia



Kate Howitt

Portfolio Manager

Fidelity International



Cathy Howard

Head of Enterprise PMO

Cbus Super Fund



DIVERSITY - IT'S NOT NICE, IT'S NECESSARY

CASE STUDY

2:30 - 3:20

Finance companies with a high percentage representation of female leadership outperform businesses with low representation. Since 2016, HESTA has been named an Employer of Choice for Gender Equality, hear how HESTA influenced the changes to make gender balance a reality.

Lisa Samuels

Executive, Marketing & People

HESTA



BREAK BARRIERS

CASE STUDY

3:40 - 4:30

Women possess natural strengths that are perfect for leadership leverage. Christina will share the story of how Verve is building the financial power of women by enhancing knowledge and building confidence.

Christina Hobbs

Co-Founder & Chief Executive Officer

Verve Super



DRINKS & CANAPÉS

Continue to network while you enjoy complimentary refreshments.

4:30 - 5:30

12 SEPTEMBER SUMMIT DAY 2

INSPIRE INNOVATION IN YOUR TEAM KEYNOTE

9:00 - 9:50

Innovation will help your organisation grow and stand out from the competition. So as a leader, it is your role to encourage and enable creativity.

Katie Docherty Chief Operating Officer,
Retail Banking & Wealth Management
HSBC Australia



HOW COURAGE & RESILIENCE CAN HELP YOU BOUNCE BACK AFTER A SETBACK CASE STUDY

9:50 - 10:40

In recent times, the Super and Wealth management industry have been under scrutiny. As a leader, it is essential to be courageous and remain resilient through turbulent times.

Sally Loane
Chief Executive Officer
Financial Services Council



PAY IT FORWARD PANEL

11:00 - 11:40

The benefits of mentoring are myriad for the mentor and mentee. Discuss how a mentoring relationship requires both parties to take responsibility for its development.

Matthew Leung
Account Manager
Schroders

Julia Weng
Portfolio Manager/Analyst
Paradice

Camilla Love
Managing Director
eInvest



SPEED MENTORING BREAK-OUT SESSION

11:40 - 12:20

This interactive exercise will give you the chance to put theory into practice.

ADVICE TO MY YOUNGER SELF PANEL

1:20 - 2:20

What do Super and Wealth management's most senior leaders know now that they wish they had known then? Our panel will reflect on their career choices and share advice for achieving personal and professional success.

Eylem Kamerakkas
Head of Managed Accounts Product
Macquarie Group

Kelly Cantwell
Group Executive, Service Operations
Hostplus

Belinda Bible Chief Operating Officer,
Investment Banking & Capital Markets
Credit Suisse

Lucy Hehir
Head of Agility
MLC Super



LEAD THROUGH INDUSTRY CHANGE CASE STUDY

2:20 - 3:10

The superannuation system is one of the most highly regulated sectors in the Australian economy, governed by a plethora of legislation, regulation, and prudential standards. As a leader, it is vital that you equip yourself and your team with the skills required to manage change.

David Bryant Chief Executive Officer,
Wealth & Capital Markets / Chief Investment Officer
Australian Unity



DEFINE YOUR NEXT STEPS ROUNDTABLE

3:30 - 4:30

Discuss challenges and collaborate to find solutions that will propel your leadership career and help you lead through change.

Julie Alexander
Chief Executive Officer
Changing Change International (CCI)

10 SEPTEMBER PRE-SUMMIT WORKSHOP

BUILD YOUR BRAND & POSITION YOURSELF FOR LEADERSHIP

Building a reputation as a future leader requires you to distinguish your brand and communicate with credibility. While each of us has unique skill sets and come from different backgrounds, it is imperative that you maintain a clear understanding of who you are, what you want and the steps you need to take to get there. This workshop will help you to create your personalised plan of action and set you on your way to success.

Modules

- Self-assessment - Understand your values
- Develop your distinct brand
- Showcase credibility and competence
- Position yourself for leadership

Amy Stewart
Leadership & Organisational
Development Specialist
Amy Stewart Learning and Development

13 SEPTEMBER POST-SUMMIT WORKSHOP

NURTURE RESILIENCE TO THRIVE THROUGH CHANGE

The effects of the Royal Commission and changing standards on the Super and Wealth Management industry have highlighted the importance of adaptability and resilience as critical skills for leaders. To succeed in this tumultuous climate, you must create a change-ready culture and build the perseverance to lead through uncertainty. This workshop will equip you with the strategies to deal with pressure, help you navigate change, and bounce back when things don't go to plan.

Modules

- The nature of change
- Survive, thrive and adapt
- Build change-resilient teams
- Action planning for leadership

Julie Alexander
Chief Executive Officer
Changing Change International (CCI)

