4[™] 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

FSC FINANCIAL SERVICES



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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START YOUR LEADERSHIP JOURNEY!

Call +61 2 8239 9711 **Priority Code** - I



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



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

44 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 Dovle

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



Asset Management

Fidelity

Vanguard

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

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

4:30 - 5:30

Continue to network while you enjoy complimentary refreshments.

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

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

PANFI 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

elnvest



SPEED MENTORING

BREAK-OUT SESSION

11:40 - 12:20

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

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

Evlem Kamerakkas

Head of Managed Accounts Product

Macquarie Group

Kelly Cantwell

Group Executive, Service Operations

Hostplus

Belinda Bible Chief Operating Officer, Investment Banking & Capital Markets

LEAD THROUGH INDUSTRY CHANGE

Credit Suisse

Lucy Hehir

Head of Agility

CASE STUDY





CREDIT SUISSE

MLC

MLC Super

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

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 changeready 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)**

4th Women in Super & Wealth Management Leadership Summit

10 - 13 September 2019

Primus Hotel Sydney

Registration Information

Booking Form

Event Reference: WSI0919A - S Priority Code: I

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