

# 4<sup>TH</sup> 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

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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)**

