

Investment Specialist Forum



Hilton Hotel - Level 2, 488 George Street

12 May 2021

Time	Agenda item	Speaker
10.00am - 10.15am	Welcome - Day 1	Annick Donat, Chief Executive - Clime
10.15am - 11.15am	Investment Philosophy A world class investment philosophy	Andrea Theouli Madison Investment Services
11.15am - 12.15pm	Economic Update	John Abernethy, Founder & Director - Clime
12.15pm - 1.00pm	Lunch	
1.00pm - 1.45pm	Asset allocation & Risk Philosophy Considerations in getting the mix right	James Purvis, Investment Strategist - Purvis Barr & Associates
1.45pm - 2.30pm	Australian Equities Current trends and insights to consider when constructing portfolios	Adrian Ezquerro, Head of Investments - Clime
2.30pm - 2.45pm	Afternoon tea	
2.45pm - 3.30pm	Global Equities Current trends and insights to consider when constructing portfolios	Charles Stodart, Investment Specialist - Zurich
3.30pm - 4.15pm	Bonds / Income / Defensive Current trends and insights to consider when constructing portfolios	Portfolio Manager Pendal
4.15pm - 5.00pm	Property Current trends and insights to consider when constructing portfolios	Ross Lees, Head of Funds Management - Centuria
5.00pm - 5.30pm	Day 1 Review & Actions	Table discussion
5.30pm	Drinks	

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Time	Agenda item	Speaker
8.45am - 9.00am	Welcome - Day 2	Annick Donat, Chief Executive
9.00am - 10.00am	Responsible Investing Responsible investing trends and what to consider when constructing portfolios	Pablo Berutti, Senior Investment Specialist, Sustainable Funds - Stewart Investors & Founder - Altioem
10.00am - 11.15am	Investment Committee Workshop	Peer workshop
11.15am - 11.30am	Morning tea	
11.30am - 12.30pm	Investment Philosophy Implementation	Peer workshop
12.30pm - 1.15pm	Lunch	
1.15pm - 2.15pm	Gaining Efficiencies: monitoring & reviewing portfolios Q&A with executives from our platform partners	Matt Heine, CEO - Netwealth Nick Blue, Head of National Accounts - BT Michael Blomfield Chief Commercial Officer - IRESS
2.15pm - 3.15pm	Insights from the best Q&A facilitated by Annick Donat	John Abernethy & 2 special guests
3.15pm - 3.30pm	Close	