

8:45AM MAKE ADVICE INNOVATIVE AGAIN

- MC's welcome and address
- The importance of innovation in the formation of a client-centric and prosperous profession
- Overview of the Fintech Pitchfest

Speaker: Aleks Vickovich, managing editor, Adviser Innovation

8:50AM WELCOME FROM PRINCIPAL PARTNER

Netwealth's commitment to innovation in financial advice.

Speaker: Michael Heine, joint managing director, Netwealth

9:00AM STAYING RELEVANT NOW AND IN THE FUTURE

Is 2025 really a long way off? Will artificial intelligence usher in the next industrial revolution? Will drones rule the skies? In this session, learn how to protect your business models from disruption, including:

- Global trends that will impact our lives in 2025
- Planning for a world of exponential change
- Exclusive research on #AdviceTech and how your practice can stay relevant

Speaker: Matt Heine, joint managing director, Netwealth

9:40AM KEYNOTE: THE CASE FOR CUSTOMER-CENTRIC VIRTUAL REALITY IN FINANCIAL SERVICES

Embrace highly unique and immersive environments that will transform your clients' understanding of how they invest their money. In this session, understand:

- How augmented and virtual reality is set to alter consumer engagement with the financial system
- The opportunity to deepen client engagement and customer service using emerging VR trends

Speaker: Peter Ford, former broadcaster, internationally-acclaimed innovator, enabler and founder of Control Bionics

This session will feature a live demo of VR in a financial services environment, using state of the art HUD glasses.

10:25AM MORNING TEA AND NETWORKING

10:50AM ADVISER SHOWCASE

Don't be afraid to try new things; gain a competitive advantage by adopting innovative business processes and be willing to experiment.

In this session, hear:

- Practical examples of innovation in action
- Personal stories of challenges and opportunities in technology adoption and business model experimentation
- Tips and traps from the adviser's perspective

Speaker 1: Peita Diamantidis, managing director and financial adviser, Caboodle Financial Services

Speaker 2: Adrian Patty, director and financial adviser, AP Financial Solutions and Spark Professional

11:30AM GOLD PARTNER PANEL: THOUGHT LEADERSHIP FOR INNOVATIVE ADVISERS

Our panel of gold partners discuss the latest developments in business and product innovation, including:

- Trends in software and digital advice
- Finding your way in an open data environment
- Utilising data to deepen client engagement
- Making use of automation

Moderator: Aleks Vickovich, managing editor, Adviser Innovation

Panelists: Amreeta Abbott, CEO, NowInfinity
Julian Plummer, managing director, Midwinter
Peter Malekas, founder and managing director, Moneysoft

12:15PM FINTECH PITCHFEST

The fintech sector is an exciting and evolving space. In this interactive session, hear from:

- Innovative early-stage fintech startups who will have just four minutes to pitch their products and solutions to attendees and an expert panel of mentors
- AI Summit delegates who will have the opportunity to judge competition participants through the lens of prospective investors

12:45PM LUNCH AND NETWORKING

1:45PM PANEL SESSION: THE FOREIGN FACT-FIND

Some advisers are demonstrating their commitment to innovation and learning through overseas immersion.

In this session, hear from some well-travelled Australian advisers about their global learnings:

- Reflections on recent study tours and industry delegations
- Relevant trends in fintech, MedTech, EdTech and InsurTech
- Next tech innovations on the horizon

Moderator: Michael Heine, joint managing director, Netwealth

Panelists: Richard Dunkerley, head of marketing and communications, life and investments, Zurich Financial Services

Ryan Merrett, chief information officer, Tribeca Financial

Steve Crawford, financial coach and adviser, Experience Wealth and teacher, theXYacademy

2:30PM GETTING AN ROI FROM YOUR ONLINE MARKETING

You've heard all the buzzwords - innovation, disruption, digital marketing... In this practical session, you'll discover how to implement these strategies into your advice practices, including:

- The fundamentals for marketing in a digital age
- How to develop a culture of innovation in a small to medium business environment
- Quick tips and tools for building your online presence
- Ways to experiment with innovative practices on a shoestring budget

Speaker: Tim Reid, founder and host of The Small Business Big Marketing Show

3:30PM AFTERNOON TEA AND NETWORKING

3:50PM EVENT PARTNER Q&A: ACTIONABLE IMPLEMENTATION

In this Q&A session, our summit event partners will answer key questions from advisers that are front of mind when it comes to:

- Implementing innovative ideas and solutions
- Innovation opportunities and challenges for advisers
- Actionable solutions that advisers can actually implement

Moderator: Aleks Vickovich, managing editor, Adviser Innovation

Panelists: Daniel Gara, head of product development, AdviserLogic
Gavin Klose, co-founder, Feedsy
Glenis Phillips, director, Financial Mappers
Hans Egger, co-founder and managing director, Astute Wheel

4:05PM INNOVATING SAFELY - BUILDING CYBER-SECURE TECH PRACTICES

A safe approach to cyber security is essential to ensuring your business thrives in the digital age.

In this session:

- Understand the cyber threat
- Hear practical solutions and services
- Learn how to build a digital risk governance framework

Speaker: Stan Gallo, partner, risk consulting, KPMG Australia

4:50PM CLOSING REMARKS