

*The Inside Network*

**IN**

# CEO and Heads of Marketing Forum

Jackalope Hotel  
Mornington Peninsula, VIC

3-4 June: CEO Forum  
4-5 June: Heads of Marketing Forum



Monday 3 June 2024

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**10:00AM | CEOS ARRIVE AT VENUE, MORNING TEA**

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**10:30AM | WELCOME AND SETTING THE SCENE BY JAMIE NEMTSAS**

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## **11:00AM | Perfect storm: The existential challenge for asset management**

Technology, artificial intelligence and low barriers to entry mean that the competitive environment for asset management will change radically over the decade to come.

This interactive workshop will explore the drivers, implications and potential solutions for incumbents as they navigate a completely different landscape than everything we have seen before.

### **SPEAKER**



Sohail Inayatullah  
*UNESCO Futures Studies*

### **FORMAT**

Workshop

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**12:15PM | LUNCH**

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## **1:15PM | Leading beyond limits: CEO insights**

Delve into the intricacies of leadership, the dynamics of the ever-changing financial landscape, and the challenges and opportunities that lie ahead.

CEOs past and present in financial services face a myriad of challenges, from regulatory shifts to technological disruptions, geopolitical uncertainties, and changing investor preferences. The panelists will share their insights on how they navigate these challenges while driving innovation, managing risk, and delivering value to stakeholders.

Key discussion points:

- **Regulatory Compliance and Governance:** How do CEOs ensure compliance with evolving regulatory frameworks while fostering a culture of integrity and accountability?
  - **ESG integration:** As environmental, social, and governance (ESG) considerations gain prominence, how do CEOs incorporate sustainable practices into their investment strategies?
  - **Talent management and diversity:** What strategies do CEOs employ to attract, retain, and develop top talent, and how do they foster diversity and inclusion within their organizations?
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### **FORMAT**

Panel

Monday 3 June 2024

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## 2:15PM | Building better sandcastles: Envisioning AI's impact on fund management

This session aims to shed light on the transformative influence of artificial intelligence in the realm of funds management, covering both its strategic implications and operational benefits.

Providing an overview, setting the expectation for a deep dive into how AI can serve as a pivotal tool in the construction of more advanced, resilient funds management strategies—akin to building better, more elaborate sandcastles.

The session will then transition to an interactive workshop phase. Here, attendees will delve into the operational advancements brought about by AI, from automating mundane tasks to revolutionising client engagement through personalised services. This hands-on segment is designed to not only illustrate AI's operational efficiencies but also encourage participants to practically engage with AI technologies, fostering a direct understanding of their potential applications in fund management.

A facilitated group discussion will follow, allowing for a deeper exploration of how AI can be seamlessly integrated into both the strategic and operational facets of fund management. Dr. Kollo will encourage sharing of insights, strategies, and challenges among participants, promoting a collaborative environment where fund managers can collectively envision the future of their industry shaped by AI.

### FACILITATOR



Michael Kollo  
*Evolved.AI*

### FORMAT

Workshop

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## 3:00PM | Out of office: Life beyond the CEO chair

Each and every one of our delegates have enjoyed top one per cent success in their careers thanks to their intelligence, energy and commitment. Many of these abilities can be further enhanced through peer learning, networking and professional development. But another key process for chief executives is to make plans today that build options and flexibility once it's time to pass the baton to the next generation.

### SPEAKER



Rob Prugue

### FORMAT

Fireside chat

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Monday 3 June 2024

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**3:45PM | AFTERNOON TEA**

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**4:00PM | Transforming our game: Leadership reimagined for future success**

In the high-stakes world of financial services, the rulebook is being rewritten and the old ways of leading no longer guarantee your success. As our industry and organisations continue to transform, as leaders, so must we. Every moment of your leadership casts a long shadow - it can spur your team to unprecedented success or hold them back from maximizing their potential.

This dynamic workshop, created exclusively for CEOs, you will engage with cutting-edge research and a robust, globally recognized leadership framework. It will invite you to reflect on your unique leadership strengths, grow your awareness of the blind spots that come with your position, and emerge with actionable insights to lead your organisation through the complex maze of today's every changing landscape.

**SPEAKER**



Jo Wagstaff  
*International leadership coach  
and author*

**FORMAT**

Workshop

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**5:45PM | CLOSE**

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**6:00PM | COCKTAIL FUNCTION**

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**7:00PM | CEO DINNER AT DOOT DOOT DOOT**

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**10:00PM | DRINKS AT FLAGGERDOOT**

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Tuesday 4 June 2024

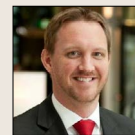
7:00AM - 8:30AM | BREAKFAST

## 8:30AM | Data is dead, long live data

Explore the dynamic world of funds management data in our session, where complexities are unravelled, and the future is unveiled. Dive into the pivotal role of data in decision-making, discover emerging trends like AI and analytics shaping the industry's landscape, and examine the challenges of integrating emotional and commercial data.

Engage in a lively Q&A, sharing experiences and gaining practical insights into data interpretation. Conclude with a call to embrace a data-driven mindset for future success. In just one session, unlock the intricacies and potential of funds management data, shaping your perspective on the industry's evolving landscape.

### FACILITATOR



Graeme Mather, co-founder  
*Datafabric*



Angus Maclaine, CEO  
*Fundamental Media*

### FORMAT

Panel

## 2:15PM | Navigating the new terrain: The convergence of financial services

The financial services sector is witnessing a significant transformation, with the blurring of traditional roles and boundaries. This pivotal panel session explores the dynamic shifts where financial planners, fund managers, asset consultants, and platform providers are venturing beyond their traditional roles, embracing new territories.

Advisers are taking on fund management, fund managers are offering advisory services, platforms are evolving into managed solution providers, and asset consultants are launching proprietary products. At the center of this transformation is the battle for 'share of wallet,' a critical theme that underscores how companies can maximize their capture of customer spending in this integrated landscape.

### SPEAKER



David Haintz, CEO  
*Merchant*



Michael Wright, CEO  
*Lonsec*



Jim DeCarlo, Ex-chief growth  
officer of Wealthspire Advisors (US)

### FORMAT

Panel

Tuesday 4 June 2024

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## 10:30AM | MORNING TEA, HEADS OF MARKETING JOIN

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### 11:00AM | Shape of the funnel changing

Funds management has traditionally been a relationship-led industry, reliant upon face-to-face interactions to generate inflows. Inevitably, this has meant that CEOs have focused on building extensive sales teams to cover the market and increase flows.

However, as the digital age continues to present more options for engagement and much sharper tools for measuring success, the traditional sales funnel is changing shape. At the same time, advisers are becoming more dependent upon model portfolios and adhering to dealer group guidelines. Doors are closing to BDMs and long lunches. These changes are providing a greater alignment between CEOs and CMOs as the overall business strategy changes focus.

This session will explore how the sales funnel is transitioning from “net-throwing” to a highly targeted and multi-tiered engagement journey, led by a constant flow of marketing insights to trigger the most suitable next interaction, with the sales team taking main stage much later in the process.

#### FORMAT

Panel

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### 11:45AM | Force for good: Purpose and profit across asset management

Audette Exel AO, a distinguished figure with over 35 years of experience in global financial services, non-profit, and social entrepreneurship, will grace our event as the keynote speaker. As a fervent advocate for diversity and a pioneer in the “business for purpose” movement, Audette has left an indelible mark on both corporate and social landscapes.

As the Founder of the Adara Group, she seamlessly bridges financial services with international development, showcasing her commitment to quality healthcare and education for all, regardless of location. Audette’s leadership extends to Adara Advisors and Adara Partners, innovative corporate advice businesses funding impactful work with women and children in extreme poverty.

Beyond her role as CEO, Audette serves as a non-executive director of Westpac, Australia’s oldest bank, demonstrating her influence in shaping the financial sector. Audette’s exceptional contributions have not gone unnoticed. She received the Order of Australia for her humanitarian efforts and was recognized by Forbes as a “Hero of Philanthropy.” Her accolades include awards from The World Economic Forum, Telstra Businesswoman of the Year, and induction into the Australian Businesswomen’s Hall of Fame.

This session promises a rare glimpse into the intersection of business acumen, social responsibility, and lasting impact.

#### SPEAKER



Audette Exel AO  
*The Adara Group*

#### FORMAT

Fireside chat



Tuesday 4 June 2024

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## WELCOME HEADS OF MARKETING

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## OPENING OF HEADS OF MARKETING FORUM ADDRESS, CEO MAY STAY

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### 1.30PM | Building back better: The pillars of branding, creativity and happy communities

Matt is the branding brains behind Four Pillars – he has a passion for great and beautiful things, and that shows in all that Four Pillars does.

Matt Jones is the smart and sophisticated guy of the trio. He is Welsh by birth but made the sensible decision a decade ago to make his life in Sydney, via New York.

Matt is the founder and creative force behind Better Happy, a small creative agency that works with great brands and has them do great things that make the world better and people happy. Before Better Happy, Matt was the Global Head of Strategy at Jack Morton Worldwide heading up a team of 200 creatives in 15 countries.

#### SPEAKER



Matt Jones  
*Four Pillars Gin*

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### 2:30PM | Decoding the digital frontier: Data is king, queen and prince!

This session will explore the evolution of marketing and advertising in the digital age and the growing importance of data, programmatic technology, and digital advertising in modern marketing strategies. As customers become increasingly more in control of the information they receive, the challenge for marketers to gain cut-through and traction also becomes harder. Data-driven and agile marketing strategies are becoming increasingly popular, but how much control do marketers have over where their ad appears, and whether it's brand aligned?

Programmatic advertising offers its own challenges, navigating ad fraud and brand safety, amongst other things. Beyond that, this session will look into how to measure what success looks like. With enough acronyms to put fund managers to shame, we'll unpack what all these measurements mean, and how they impact ROI.

#### SPEAKERS



Julian Peterson  
*Dianomi*



Graeme Mather  
*Data Fabric*

#### FORMAT

Workshop

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Tuesday 4 June 2024

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**3:30PM | AFTEWRNOON TEA**

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## **4:00PM | Building better sandcastles: The age of AI in fund management**

Dr. Michael Kollo will explore the transformative impact of artificial intelligence on the fund management industry, with a specific focus on its implications for marketing and distribution professionals. The session will commence with an overview of the industry's shift towards a scale and distribution model, where homogeneous products and funds compete based on thought leadership, expertise, scale, and brand. Dr. Kollo will also highlight the emergence of new thematic funds focusing on environmental impact and broader societal issues.

The discussion will then delve into the advent of digital marketing in the fund management industry, examining how companies have embraced data-led marketing campaigns and increased their allocation of marketing spend towards digital channels. Dr. Kollo will explore the potential benefits and challenges of digital marketing strategies, before transitioning to the impact of AI on the industry. He will contrast the effects of data analytics, quantitative investment, and automation with the potential capabilities of Generative AI, emphasising how AI can revolutionise product development, go-to-market strategies, and client engagement through personalized services and expert-like communication.

### **FACILITATOR**



Michael Kollo  
*Evolved.AI*

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**5:00PM | CLOSE**

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**6:00PM | COCKTAIL RECEPTION**

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**7:00PM | HEADS OF MARKETING DINNER AT DOOT DOOT DOOT**

## **Lead like you: How authenticity transforms the way you live, love and succeed**

Prepare to embark on a remarkable journey. Renowned leadership coach Jo Wagstaff, drawing from the depths of her personal and professional memoir, including her time as a CMO, her studies in somatic psychotherapy, and years of coaching professional women, and presents a transformational roadmap to redefine success and create a life that resonates with authenticity.

Through courageous anecdotes, evidence-based practices, psychological research, and indispensable tools, you will be invited to forge a new and profound connection with yourself and your leadership.

### **SPEAKER**



Jo Wagstaff  
*International leadership coach  
and author*

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**10:00PM | DRINKS AT FLAGGERDOOT**

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Wednesday 5 June 2024

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**7:00AM | BREAKFAST**

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**9:00AM | The power of wow: Managing brand against innovation**

As fund managers continue to grow in size and capabilities, the rules and regulations also tend to increase enormously. In this session we will consider how to maintain the integrity of a global brand whilst encouraging innovation and tailoring to the local market.

Carving out a space as a recognised and respected brand in a crowded marketplace is a huge challenge, maintaining it is just as hard. But so too is the ongoing challenge of remaining fresh and interesting to gain cut-through and to keep audiences engaged.

In this session we will have the opportunity to hear from some of the most creative industry-leading brands as they delve into the complexities of building a strong brand, and how to evolve it through innovation. We'll also explore whether it is possible for an in-house team to be truly creative, or do you need to look outside your organisation to drive real creativity and innovation?

**FACILITATORS**



Chris Tucker  
*Capital Outcomes*



Tori Tonzing  
*Capital Outcomes*

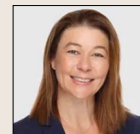
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**10:00AM | Case study: Wateraid and ethical CSR marketing**

What does ethical CSR marketing even mean in 2024? Is it ethical and is it really important in funds management?

In this session we will explore relevant global trends in financial services and banking, demonstrating successes and failures in finding a true connection that matters to clients. We will also consider the most relevant criteria for developing partnerships and sponsorships, presenting real examples of how successful partnerships/programs positively impact business.

**SPEAKER**



Andrea Roberts  
*ClearBridge Investments*

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**10:45AM | MORNING TEA**

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Wednesday 5 June 2024

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## 11:00AM | Media buying: Budgets, allocating and measuring value

Achieving maximum reach for the awareness of your product involves a blend of established processes and fresh developments that reflect an increasingly data-rich environment.

Two presentations by the leading media buyers in the funds management space.

### SPEAKER



Angus Maclaine  
*CEO at Fundamental Media*

### SPEAKER



Chris Nardi  
*COO at APAC Ptarmigan Media*

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## 12:00PM | Inspiration and innovations: Head of Marketing to CEO

Heads of Marketing can bring forward-thinking attributes to the role of CEOs, and also have market vision and data-driven analysis. We talk to those who have made the executive jump and what their journey was.

As the inaugural Head of Marketing Forum draws to a close, this session will discuss the best ideas from the forum with a focus on the key takeaways for the development of the head of marketing role in your organisation's success and what the next steps are in implementing innovations.

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1:00 PM | LUNCH

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2:00PM | DEPART VENUE

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# A snapshot





*The Inside Network*

**IN**

