Implement & Integrate
Real Return Outcomes

association of real return investment advisers limited

ARRIA

Date:		12th August 2014
Time:	**12.00 to 12.30 pm:**	All welcome to enjoy a light lunch & meet presenters and ARRIA members
	12:30pm to **3:30pm:**	Presentations
	3:30pm to 4:30pm:	Tool Time & Open Forum to discuss presentations and other issues
Host:		**Standard Life Investments**
Location:		Albert Room, The Intercontinental Hotel, 117 Macquarie Street, Sydney

Time	Topic	Presenter
12.00 – 12.30	Enjoy a light lunch and a chance to meet ARRIA representatives, presenters and other attendees.	
12:30 – 12:45	ARRIA welcome: What is ARRIA and what do we do? Define what is meant by Real Return in the context of ARRIA; Attendee introductions.	**Philip Reid** General Manager ARRIA
12.45 – 13.30	**What are the implications of developing Real Return outcomes for PI and the regulators?** What is the current position of the underwriters and regulators e.g. FoS, when incorporating non-traditional manager strategies and alternatives? From an underwriter's perspective, what framework could you have in place?	**Gavin Donner** General Manager Mega Capital
13.30 – 14.30	**Portfolio Construction: Which alternative 'strategies' work when?** Discussion of research findings: What economic environment, or during what type of market conditions do the various strategies perform? How do we assess historical performance, and understand future expectations... what is realistic to expect. What types of strategies are acceptable for use with what types of clients, and how should this be communicated. Finally, how can these be accessed and implemented?	**Panel Discussion** Chair: **Alistair Saunders** Northstar Financial Advisers Pty Ltd Ironbark Asset Management Grant Samuel Funds Mgt Australian Fund Monitors Pengana Capital
14:30 – 14:45	**15 Minute Break**	
14.45 – 15.30	**What are the new investment opportunities, 'access' methods (e.g. LICs), strategies, asset classes, investment flavours?** What are they; what are the drivers of returns; why now; how can we implement; how do we access and monitor; how can we articulate the benefits to clients; how can these be built into portfolios to achieve Real Return outcomes?	**Panel Discussion** Chair: **Simon Ibbetson** 358 Pty Ltd Bluesky Alternative Investments Australian Fund Monitors Spire Capital Mason Stevens
15:30 – 16.00	**Tool Time:** What tools are available when looking to develop and communicate Outcome Based strategies to clients? Australian Fund Monitors, myTelos.	
16.00 – 16.30	**Open forum** Who does what and why? What works, what doesn't? Are there other ideas or topics advisers would like to discuss? Consider agenda for next round table	