



# Investment Administration CONFERENCE

February 18, 2015 | The Ivy Ballroom, Sydney

**DRAFT AGENDA**

- 9.00 **Welcome**  
**Colin Tate, chief executive, Connexus Financial**
- 9.10 **Opening Remarks**  
*Host*  
**Leigh Sales, journalist and author**
- 9.20 **Preparing for Growth – Opportunities and Challenges On The Horizon**  
As funds grow and membership needs change, platforms and investment technology must also evolve. What is best practice for fund investment operations in technology and systems today, and where do opportunities exist for funds to become slicker, smarter and more efficient in the near future?
- **David Bardsley**, transformation program director, **Australian Super**
  - **Melinda Howes**, general manager superannuation, **BT**
  - **Stephen Huppert**, partner, **Deloitte**
  - **Name TBC, DST Global Solutions**
  - **Chair: Leigh Sales, journalist and author**
- 10.05 **The Ideal Investment Operations Model – What Does It Look Like?**  
What is the ideal operations model for your superannuation fund? What roles should be outsourced and what should be performed internally. This session will bring together insights from large, mid-tier and small funds to explore all facets of the debate surrounding the ideal investment operations model.
- **Lounarda David**, investment operations manager, **Sunsuper**
  - **Peter Rowe**, chief operating officer, **Vision Super**
  - **Drew Vaughan**, owner, **Dymond, Foulds & Vaughan**
  - **Naresh Subramaniam**, head of investment services – asset servicing, **National Australia Bank**
  - **Chair: Leigh Sales, journalist and author**
- 10.50 **MORNING TEA**
- 11.10 **Investment Operations As A Source Of Revenue**  
Some super funds today are using their middle office to not only perform analysis and compliance, but as a revenue generator for maximising portfolio efficiency, securities lending and class action claims. For some this means that revenue can meet the costs of large operations. This session will look at key ways in which investment operations can add value to the business, rather than just operating as a cost centre.
- **Peter Curtis**, head of investment operations, **AustralianSuper**
  - **Jonathon Green**, head of investments, **New South Wales Treasury Corporation**
  - **Brian Slade**, director of sales and relationship management, Australia and New Zealand, **Goal Group**
  - **Phil Garrett**, managing director, head of securities finance, Australia & New Zealand and head of strategy and business development for securities finance, Asia, **State Street**
  - **Chair: David Rowley**, editor, **Investment Magazine**

#### 11.55 **How Better Data Can Save Your Fund Money**

Could your data analysis and data capture be more efficient, more cost effective? Could they identify cost savings and investment opportunities across your fund? This session will look closely at the business benefits that can be derived from the effective utilisation of increasing data volumes.

- **Clare Tam**, chief information officer, **VicSuper**
- **Mark Neary**, managing director, Asia Pacific, **Milestone Group**
- **Chair: Leigh Sales, journalist and author**

#### 12.40 **LUNCH – Featuring Keynote Panel: Super 3.0**

This session, held over lunch, will explore the future of superannuation from a political perspective, bringing together thought leaders to discuss the key challenges, threats and opportunities shaping the sector over the next five, 10 and 30 years.

- **Ian Silk**, ceo, **AustralianSuper**
- **Garry Weaven**, pioneer of industry funds
- **Chair: Leigh Sales, journalist and author**

#### 14.00 **Optimal Ways Of Meeting Regulatory Compliance**

What level of resource do funds need to fully meet APRA compliance? This session will discuss the ideal level of internal resources, the communication with trustees and the level of support from providers needed to efficiently comply with new regulation.

- **John Creeley**, chief financial officer, **First State Super**
- **Andrew Grice**, general manager, finance, **State Super**
- **Nick Vamvakas**, chief risk officer, **Equisuper**
- **Robyn McMahon**, general manager, diversified institutions division, **APRA**
- **Chair: Leigh Sales, journalist and author**

#### 14.45 **Performance Reporting And Analytics**

This session will explore the new types of tools being used for performance reporting and analytics. It will look at the ways the data produced can be interpreted, particularly in a post-tax performance reporting environment.

- **Kyle Ringrose**, head of investment operations, **Qsuper**
- **Emma Jonceski**, Senior Investment Analyst, **Christian Super**
- **Chair: Leigh Sales, journalist and author**

#### 15.30 **AFTERNOON TEA**

#### 15.50 **Getting The Most From Your Custodian**

Custodians can offer commoditised services, but for a complex fund to gain full benefit, funds need to work closely with their custodian to achieve a more tailored solution. In this session, a custodian and a superannuation fund will discuss how this evolving relationship can work.

- **Leonie McCracken**, senior executive operations, **CSC**
- **Angelo Calvitto**, senior vice president – head of sales and relationship management, **Northern Trust Australia**
- **Chair: Leigh Sales, journalist and author**

#### 16.35 **The Power of Partnership: The Evolution of Fund and Custodian Relationships**

As the industry evolves and regulatory pressures increase, so does the need for a genuine partnership between funds and their custodians. This session will explore the changing nature of this relationship over the next

five years, with a focus on issues including the provision of data, emerging capabilities and defining value for both sides.

#### 17.20 **Close of Conference**