

The most important event
for Workplace Super
in 2016



WSSSA CONFERENCE SYDNEY 2016

FOUR SEASONS HOTEL SYDNEY - 26 AUG 2016

CPD
POINTS

MAXIMUM 6 POINTS/
HOURS WITH BOTH
THE FPA & AFA

BRINGING FINANCIAL
EDUCATION TO THE WORKPLACE



WSSSA

WORKPLACE SUPER
SPECIALISTS AUSTRALIA

A MESSAGE FROM THE CEO

The WSSA is extremely excited to be hosting its 2016 Conference at the Four Seasons Hotel, Sydney on Friday, 26 August 2016.

We have put together an impressive array of speakers.

Adam Gee, CEO of SuperRatings, will give a modern view on Comparing Funds.

Terry Rhodes, WSSA President, will announce the results of the CoreData Survey of the Workplace, both of employees and employers, with the creation of the **WSSA Workplace Financial Wellness Index**.

This will be followed by an employer's point of view on Workplace Financial Education from **Vaughan Paul, Vice President of Human Resource at Optus**, and a panel of experts will discuss if Financial Technology Tools are the full solution or do we still need human involvement.

As **CEO of the WSSA** I will let you know the WSSA forward plans and provide a **Political Update**. It is anticipated that there will be a political speaker who will be announced after the election.

A panel of Advisers and Fund Manager Executives (both Industry and Public Offer) will discuss **Are Default Members really better off in MySuper?**

Insurance is an important part of what WSSA members do. So a further panel made up of insurers,

adviser and brokers will discuss **Group Insurance in MySuper - are there better solutions?**

The final panel session is made of representatives of our Partners and will let us know how Workplace Super looks like from a Fund Manager viewpoint. They will tell us **What is Working and What is not**.

All this will be held together by the MC, Kerry Chikarovski, a former leader of the NSW Liberal Party.

So if you work in the Workplace Super space, or are considering moving into it, then this is a chance to network with your peers, and understand the challenges of this exciting industry sector going forward.

Douglas Latto



WHO SHOULD ATTEND?

This is attractive to all that work in the workplace super space, whether as an adviser, fund provider or supplier of other services to the industry. For those entering this exciting industry it will also be highly educational.

WHERE

The Conference will be held at Four Seasons Hotel in Sydney, one of the most prestigious hotels in Sydney.

PRICES (GST INCL)

\$895 - Standard \$495 - Members and Partners

Non-member practices wishing to attend can join the WSSA for an additional \$100 (total \$995).

APPLY AT

www.wssa.asn.au/conference

QUERIES

Douglas Latto
0425 213 095 or douglas@wssa.asn.au

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TIME	TOPIC	SPEAKER
Moderator: Kerry Chikarovski		
8.45am	Introduction and Welcome	Kerry Chikarovski
9.00am	Summary of WSSA Activities for the Year	Douglas Latto Chief Executive Officer, WSSA
9.10am	Political Update	Douglas Latto , Chief Executive Officer, WSSA and a Political Representative
9.45am	Panel Session Are Default Members Really Better Off in MySuper?	Moderator: Gareth Hall David Lewis , Actuary and Adviser, Northbridge Jack McCartney , Executive Manager, UniSuper Michael Mulholland , EGM Growth & Advice, SunSuper Ashley Palmer , AON
10.30am	MORNING TEA	
11.00am	Panel Session Group Insurance in MySuper - Are There Better Solutions for Members?	Moderator: Nick Fraietta Cathy Navarro , Aust. Advice Leader, MoneyWise Neil Robinson , National Insurance Manager, Jardine Lloyd Thompson (JLT) Jenny Oliver , GM of Group Insurance, TAL Anthony Clough , Strategic Partnership Manager, AIA
11.45am	Comparing Funds - A Modern Approach	Adam Gee CEO, SuperRatings
12.30pm	LUNCH	
1.30pm	WSSA Financial Wellness at the Workplace Survey Results	Terry Rhodes President, WSSA
2.00pm	Employer View of Workplace Financial Education/Literacy	Vaughan Paul Vice President of Human Resources, Optus
2.35pm	Panel Session Financial Wellness Tech Tools - Are They the Full Solution?	Moderator: Terry Rhodes Allan Rickerby , CEO, Super-Advice Daniel Cohen , Principal, Flare Richard Matsinger , Managing Director, Axis Ian Dunbar , Owner, Fin Digital
3.20pm	AFTERNOON TEA	
3.50pm	Panel Session MySuper Providers - Workplace Super - What is Working and What is Not?	Moderator: Douglas Latto Vicki Doyle , AMP Matt Englund , BT John Anderson , CFS Steve Black , IOOF Peter Arnold , MLC
4.50pm	Closing Remarks	Terry Rhodes President, WSSA
5.00pm	DRINKS	
6.00pm	CLOSE	



Kerry Chikarovski

Government Relations Advisor

One of the country's most respected and admired former female politicians, Kerry 'Chika' Chikarovski, is a former NSW Opposition leader and the first woman to lead a major political party in the state of New South Wales (1999-2002).

In 2003 Chika retired from politics and the following year launched her co-authored autobiography, Chika.

Her government relations business, Chikarovski & Associates, which she started in 2003, continues to achieve excellent results for her clients. With her strong political background and vast experience in dealing with government and bureaucracy, Chika and her team advise across a range of industry sectors on policy and regulatory issues, as well as in relation to major projects and procurements.

Today Chika is a highly sought after political and media commentator, keynote speaker, Master of Ceremonies, Board Director and Ambassador.

She is Chair of NSW Women's rugby union and Road Safety Education (RSE). She is a Board Director of New South Wales rugby union, Adopt Change, Humpty Dumpty Foundation and Our Watch.

Chika is also a proud ambassador for YWCANSW and Australian Indigenous Education Foundation (AIEF).



Adam Gee

Chief Executive Officer, SuperRatings

Adam has over 20 years' experience in the superannuation industry. Adam joined SuperRatings as the Head of Consulting in July 2013 and was promoted to Chief Executive Officer on 1 July 2014. Prior to joining SuperRatings, Adam was a Director of KPMG, where he worked for 11 years and before this was employed at Colonial First State and AMP.

In previous roles, Adam was involved in delivering a range of consultancy services to superannuation funds (not-for-profit funds, retail funds, corporate funds and SMSFs), administrators, custodians, insurers and employers. Adam has managed a variety of consulting projects including a range of administration, insurance, custodian, asset consultant and Master Trust tenders. Adam has also provided strategic advice to funds on MySuper, APRA Prudential Standards and numerous regulatory changes. He has also conducted numerous risk management projects and has assisted funds with the interpretation of complex superannuation legislation.

Adam has a Bachelor of Science, majoring in Psychology, from the University of New South Wales and holds a Graduate Diploma of Applied Finance and Investment and is a Graduate of the Australian Institute of Company Directors. Adam is a Fellow of the Financial Services Institute of Australasia and is a member of the ASFA Fund Operations Standing Advisory Panel.



Douglas Latto

CEO, WSSA

QUALIFICATIONS

- Certified Financial Planner
- Bachelor of Arts (Honours)
 - Pure Maths & Statistics

HISTORY

Douglas started in the superannuation industry in 1973 in Edinburgh and then subsequently worked as a Pension Consultant to large companies in London.

He moved to Australia in 1986 where he quickly moved into the position of State Manager for major superannuation consultancies. In this role he was responsible for advising some of the largest super funds in Australia.

In 1995 he set up his own Workplace Super Specialist practice to ensure that employers and their employees received a high level of service. Services are provided to all employers and their staff, small, medium and large.

In 2009 Douglas was a founder member of the WSSA (previously the CSSA). He realised that the important work that Workplace Super Specialist firms do was under threat from the proposals around FoFA and StongerSuper (MySuper). He was the first Secretary, President for 4 years and has now taken on the role of Chief Executive Officer.

In these roles, Douglas meets with politicians, bureaucrats, regulators, and other major stakeholders. He has also represented the WSSA at numerous Parliamentary Joint Committee and Senate Economic Committee hearings. He continues to meet with the major funds to develop solutions for Workplace Super Specialists.



Vaughan Paul

Vice President, Human Resources, Optus

Vaughan Paul is the Vice President, Human Resources (HR) for Optus. Vaughan is responsible for leading the HR function, including the development and delivery of the people strategy. He has held this role since 2009.

Vaughan joined Optus in November 2005 as General Manager HR for Optus Business where his responsibilities included leading staff delivering to Corporate, Government and Business customers.

In his time with the Singtel Group and Optus, Vaughan has successfully driven change across a range of HR functions including career development, talent and leadership programs and staff engagement in Australia and across the Region.

Prior to Optus, Vaughan worked in a range of senior HR roles with Computer Sciences Corporation Australia including HR Director of Global Infrastructure Services, Director of Human Resources - New Business and Head of Human Resources, Business Banking for Westpac.

Vaughan holds a Bachelor of Commerce from the University of Western Australia and a Graduate Diploma in Applied Finance and Investment from the Securities Institute of Australia.

WSSA CONFERENCE SYDNEY 2016

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