



WSSA
CONFERENCE
2017



Bringing Financial Education to the Workplace

The most important event for
Corporate Super in 2017

BOOK NOW

25 August 2017

Level 28, Tower 1
200 Barangaroo Ave
Barangaroo
Sydney

CPD
POINTS

MAXIMUM 6 POINTS/
HOURS WITH BOTH
THE FPA & AFA



WSSA

ENGAGING WORKING AUSTRALIANS
WITH THEIR SUPER



The WSSA is extremely excited to be hosting its 2017 Conference at L28, Tower 1, 200 Barangaroo Avenue, Sydney on Friday, 25 August 2017

WE HAVE YET AGAIN PUT TOGETHER AN IMPRESSIVE ARRAY OF SPEAKERS.

Steve Freeborn, Head of Client Relationships at Rice Warner will talk on topical issues that affect Workplace Super Specialists

Byron Bostock of CFS sits on the industry working group on Single Touch Payroll. He shall share his experiences and explain what this means for Workplace Super Specialists.

We are extremely pleased that **Marc Calwell, Training Delivery and HR Projects Manager of Kennards Hire** has agreed to give us an employer perspective of the value of Workplace Super Specialists.

Terry Rhodes and Paul Mann of the WSSA will provide a Global Perspective of Financial Wellness Programmes and announce the next WSSA Financial Wellness Survey.

As in previous years, Terry Rhodes will open providing a summary of the year's activities followed by **Douglas Latto, CEO of WSSA**, who will be provide a political update.



Douglas Latto

THIS WILL ALL BE SUPPLEMENTED BY 3 PANEL SESSIONS:

- Fund Manager representatives will give their view of what **MySuper investments would look like into the future**
- We shall then look at **Group Insurance and its relevance in the modern world**. The panel will draw on people working in different aspects of this world
- The final Panel Session will look at **Operating an Efficient Super Practice**, in which some specialist business coaches and larger business owners will share thoughts.

All this will be held together by our popular **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.

Looking forward to seeing you there.

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 Barangaroo, Sydney's most vibrant financial precinct. Level 28, Tower 1
200 Barangaroo Avenue, Sydney

PRICE (GST INCL)

\$950 - Standard
\$550 - Members

Non-member practices wishing to attend can join the WSSA for an additional \$100 (total \$1,050).

APPLY AT

www.wssa.asn.au/conference

QUERIES

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

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TOPIC

SPEAKER

Moderator: Kerry Chikarovski

8.45am	Introduction and Welcome	Kerry Chikarovski Former leader of the NSW Liberal Party
9.00am	Summary of WSSA Activities for the Year	Terry Rhodes President, WSSA
9.15am	Political Update	Douglas Latto , Chief Executive Officer, WSSA
9.40am	Panel Session MySuper Investments for the Future	Moderator: Gareth Hall Jack McCartney , Executive Manager, Unisuper plus representatives from AMP, BT and IOOF
10.40am	MORNING TEA	
11.10am	Single Touch Payroll – What it Means for the Superannuation Industry	Byron Bostock Executive Manager Operational Change and Advocacy, CBA
11.45am	Topical Issues Affecting Workplace Specialists	Steve Freeborn Head of Client Relationships, Rice Warner
12.30pm	LUNCH	
1.30pm	Panel Session Group Insurance Relevance to the Modern World	Moderator: Jonathan Sherlock George Hodgson , Principal, Group Income Protection Solutions Coralie Kenny , Junior Vice President, Law society NSW, plus an Insurer representative
2.20pm	Workplace Member Engagement and a Global Perspective on Financial Wellbeing Programs	Terry Rhodes President, WSSA Paul Mann Committee Member, WSSA
2.55pm	The Value of a Workplace Super Specialist – An Employer Perspective	Marc Calwell Training Delivery and HR Projects Manager, Kennards Hire
3.35pm	AFTERNOON TEA	
4.05pm	Panel Session Operating an Efficient Workplace Super Practice	Moderator: Dermot Lindsay Gareth Hall , Principal, Lifestyle Financial Services Natalie Parris , Director, Decision Tree Harvey James , Director, Enterprise Coach
4.50pm	Closing Remarks	Terry Rhodes President, WSSA
5.00pm	COCKTAIL DRINKS	
6.00pm	CLOSE	



Stephen Freeborn

Head of Client Relationships, Rice Warner

Steve has 20 years' experience in the financial services industry across all parts of the value chain, having held senior positions with BT Financial Group and Perpetual Limited before (re) joining Rice Warner in late 2012.

After initially being trained as an actuarial consultant at MJR Consultants (a predecessor firm to Rice Warner), where he helped develop the outsourcing service and project managed a number of transitions, Steve spent over 12 years in two of Australia's pre-eminent wealth management businesses in a combination of sales, sales management and business management roles in Adelaide and Sydney with intra-state, interstate and national responsibilities.

He brings a high level of market knowledge together with a deep technical knowledge of the superannuation, insurance and investment industry and its participants. His experience in business acquisitions has provided deep insight



into the various business drivers and identification of where and how synergies are realised.

Steve has a strong reputation throughout the financial planning industry across Australia as a trusted and reliable business professional. He has been recognised for his leadership capabilities and has experience leading

teams to develop and implement business plans and sales and marketing strategies.

The combination of managing distribution teams across numerous states and territories together with his time in distribution roles, has afforded Steve a deep knowledge of the wealth management industry, and its various participants, across Australia.

Steve is a Senior Fellow of the Financial Services Institute in Australia, an Affiliate of the Institute of Actuaries in Australia and a Member of the Australian Institute of Company Directors.

Marc Calwell

Training Delivery and HR Projects Manager, Kennards Hire

Marc joined Kennards Hire in May 1982 as a Serviceperson/Driver entry level role at Artarmon in Sydney's north. He progressed through the business with branch roles to Branch Manager at various branches in Sydney until promoted to Area Manager in 1998. Responsible for NSW for 2 years in 2004/2005.

He moved into the HR space and completed an MBA with an HR/IR major.

Marc worked for a number of years as



the only HR person in the business, developing performance management systems and learning, as well as initiating EAP systems and links to financial well-being through superannuation and such.

He specialised as the HR business partner from 2011 to 2015 then moved to a specialist Trainer and Projects Role.

Completed Cert IV in Training and Assessment in 2015.



Kerry Chikarovski

Former leader of the NSW Liberal Party

Former politician and leader of the New South Wales Liberal Party (1999-2002) and Founder of Chikarovski & Associates, Kerry Chikarovski was proudly the first woman to lead a major political party in New South Wales.

After leaving politics, Kerry founded government relations firm, Chikarovski & Associates in 2003.

Chikarovski & Associates work with organisations, not for profits and industry associations, to help them understand the processes



of government and work successfully with bureaucrats and politicians at Local, State and Federal levels of government.

The firm advises clients across a range of industry sectors on policy and regulatory issues, as well as in relation to major projects and procurement. Areas include; banking and finance, infrastructure, construction and property, transport, energy and natural resources, health, sport, manufacturing. ◀●

Byron Bostock

Executive Manager, CFS

Byron is currently Executive Manager Operational Change and Advocacy within the Commonwealth Banks Wealth Management division.

Wealth Management Advocacy formulates positions on key public policy and industry issues impacting CBA Wealth Management and drives outcomes which support the business and its clients. In his role Byron is involved in influencing policy outcomes both directly



through engagement with Government and Government agencies, as well as through strong engagement with relevant industry bodies.

Byron's area of specialisation is as a strategic adviser on operational matters concerning superannuation, including data standards, government digital initiatives and technological change. ◀●



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●▶ www.wssa.asn.au/conference

