

FEAL National Conference

Wednesday 4 August – The Westin Sydney

*Whose interests
are you really serving?*



Presented in partnership with



FEAL National Conference



Program 2010

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9.00 Serving the interests of our fund stakeholders: are we delivering value to them?

Members; Trustees; Employers; Employees; Unions; Government; Advisors – the competing, and occasionally conflicting interests of fund stakeholders, present a challenge for fund CEOs and senior executives. Ross Greenwood will facilitate a discussion amongst a group of respected chief executives leading complex organisations, both in and outside, of the financial services industry. The panel will share insights into how they balance the challenging demand for their time and attention, together with the multiple interests and layered objectives of stakeholders to achieve the best possible outcome for the end beneficiary.

Presenters:

Ross Greenwood in discussion with:

- **Mark Genovese**, Maritime, Mining, Power Credit Union
- **Danielle Press**, Equip Super
- **Dr Kerry Schott**, Sydney Water
- **Michael Seton**, AGEST
- **Naomi Steer**, Australia for UNHCR



Ross Greenwood



Mark Genovese



Danielle Press



Naomi Steer



Michael Seton



Kerry Schott

10.20 Morning Break

11.00 Whose interests are we really serving? *A global perspective:* *Roger Urwin, Towers Watson*

As one of the world's leading authorities on pension fund design, Roger Urwin will provide his response to the key question posed by the 2010 FEAL Conference and consider 'Whose interests are we really serving?'

Retirement savings: managing risk or enhancing returns

Riding the see-saw of risk and return has provided a hair-raising experience for fund executives over the past few years and looks to continue to do so. Greg Cooper will provide delegates with practical insights into some of the hidden and less obvious risks in this post GFC environment and consider the impact of being too risk averse while once in a lifetime investment opportunities pass-by unrecognised. Pete Gunning will give his perspective on exactly where the greatest post-GFC investment opportunities lie and how to spot them.

Conference chairman, Ross Greenwood will lead a discussion with the CIOs of some of Australia's most prominent super funds.

Presenters:

Greg Cooper, Schroders, **Pete Gunning**, Russell Investments

& Ross Greenwood in discussion with:

- **Jim Christensen**, Telstra Super
- **Mark Delaney**, Australian Super
- **Alison Tarditi**, ARIA



Roger Urwin



Greg Cooper



Pete Gunning



Alison Tarditi



Mark Delaney



Jim Christensen

12.40 Lunch Break

1.45 Whose interests are we really serving? *A global perspective:* Don Ezra, Russell Investments

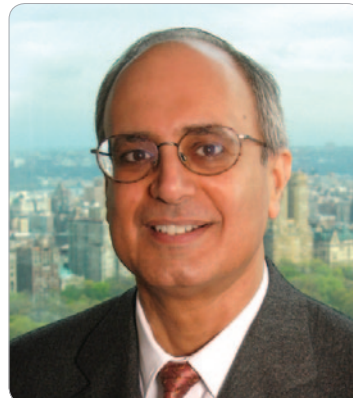
As co-author of *Pension Fund Excellence* and *The Retirement Plan Solution*, Don Ezra helped to create the world's pre-eminent texts on improved pension fund performance, design and management. Via brief video from New York, Don will offer his incisive views on the FEAL Conference theme and suggest that while service to members may be the prime priority for fund executives it isn't necessarily their only goal.

Embracing customer service and technology to improve outcomes for the fund and its members

When it comes to a fund's member service strategy it seems there is often a disconnect between the intended outcomes and actual customer perceptions of service. This clearly impacts the customer experience, intentions to stay or change funds, and ultimately fund performance factors such as retention and share of wallet. Drawing on recent experience working with super fund clients, John Turnbull will help fund executives to understand how they can drive and deliver lasting value to the fund and its members through improved customer management. Peter Williams will then lead delegates to consider how leveraging new technology can lead to improved operational and service delivery outcomes within the customer management context.

Presenters:

John Turnbull, Customer Connect & **Peter Williams**, Deloitte Digital



Don Ezra



John Turnbull



Peter Williams

3.10 Afternoon Break

3.45 Challenging the Status Quo

Drawing on his extensive experience in the financial services industry, his role as a trustee director of a major superannuation fund and his personal commitment to sustainability and social change, Chris will outline his views on the current state of the superannuation industry – both in terms of the suitability of its core products and its administrative and technological capabilities. He will challenge fund executives to confront the question – is there a better way to do it in this business?

Presenter:

Chris Cuffe, Social Ventures Australia



Chris Cuffe

5.00 Drinks served

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