





Monday 19 March, 2012

8:00am – 10:45am	AIST Member only breakfast followed by AIST AGM & Member Briefing
11:00am – 11:15am	Conference welcome
11:15am – 12:15pm	<p>Plenary #1: Innovation - building the future Australia As a nation, what are we doing to support innovation to build our economy and the next generation of jobs? What do we need to be investing in to ensure strong economic growth into the future? Peter Beattie will give us his insights into how, collectively we can build the future Australia.</p> <p>Speaker: Peter Beattie, former Queensland Premier, currently Resources Sector Supplier Envoy and proponent of innovation in Australia</p>
12:15pm – 1:30pm	<p>Lunch proudly supported by our Gold Industry Partner</p> <p>12:30pm: Official opening of the bConnected Expo</p> 
1:30pm – 3:00pm	<p>Plenary #2: As the World Turns What's really happening in Europe? The instability of European economies, changes in leadership and systemic issues in global markets is not engendering trust in European markets. Will leadership and strong financial stewardship guide Europe through this turbulent time, or is it time for sweeping reform to stabilise this ravaged market?</p> <p>Keynote Speaker: Sharan Burrow, General Secretary, International Trade Union Confederation</p> <p>Followed by an International panel discussion on global investments: How are our international peers interpreting the global, especially European, problems and how are they dealing with them? What opportunities exist for International collaboration on investments and shareholder activism?</p> <p>Speakers: Wolfgang Engshuber, Chair, PRI Howard Jacobs, Trustee, Universities Superannuation Scheme UK</p>
3:00pm – 3:30pm Afternoon Tea	<p>proudly supported by our Silver Industry Partner</p> 
3:30pm – 4:30pm Parallel Stream #1:	
GPS Stream	<p>Transparency and Disclosure of Not-For-Profit Funds AIST will release its research on fund transparency and disclosure against its Governance Framework for Not-For-Profit Superannuation Funds.</p>



This session will discuss the findings from the research, explore improvements from 2010 to 2011 disclosures and showcase some best practice examples.

Speakers:

Eva Scheerlinck, Trustee Governance & Professional Standards Manager, AIST
 Rob Demasi, Governance & Research Officer, AIST

MM Stream

Managing Human Capital

As our industry continues to under-go substantial change, this workshop will provide fund executives with practical tools to assist you to attract the best people to your business, and retain them during periods of uncertainty, change and volatility. Our presenter brings her wealth of experience in this area, and will also cover how to ensure that you are rewarding your people sufficiently, and retaining them in a competitive market.

Speaker:

Lesley Brown, Asia Pacific Employee Surveys & Insights Practice Leader, Towers Watson

Invs Stream

China - will the dragon play ball?

China's economic leadership at a time when the West is without.

Speaker:

TBA

Op/Ad Stream

Strategic and Tactical Implementation Workshop

This will be a high level session to set the scene and encompass all the reforms. This session will look at what not to know but what to do, along with discussing a timeline of implementation which will include a panel discussion which provides a toolkit for operational implementation.

Speaker:

TBA

ME Stream

Member profiling

At CMSF last year we heard from innergi about how each of us have a “money personality” and how that can be aligned to traits of a Owl, Dolphin, Monkey or Labrador. By knowing these personalities and the research behind them, a fund could use these traits to have better interaction with their members. Well, Auscoal has taken the next step and used this concept when they now engage with their members. Topics covered will include:

- Why Auscoal decided to take the next step
- How they identified the various “animals”
- Explaining the concept to members
- Has the project been successful
- Is there a “use by” date

Speakers:

Bruce Watson, Chief Executive Officer, AUSCOAL
 TBA



4:35pm – 5:45pm

**Plenary #3:
Member Engagement – bring it on?**

For the first time in 20 years, legislative changes and the aggressive competitive playing field will shake up the way super funds will obtain members and maintain engagement. But before engagement comes courtship, getting to know each other and building that everlasting relationship. This session takes a long hard look at building engagement from the ground up, and will challenge you to think about some of the crucial issues about member engagement – it’s not just the glossy brochures, but:

Does member engagement mean the same to each fund? Who’s involved in the engagement process? How can we measure member engagement and what will it look like when we’re there? And who is actually responsible for member engagement?

See the current state of play and watch as two gurus from ‘marketing and advertising land’ give us their pitch for super advertising, 2012 and beyond.

Panel:

Tim McColl Jones, Director, Clemenger BBDO
Adam Ferrier, Founding Partner & Consumer Psychologist, Naked Communications

**5:45pm – 7:45pm
Welcome Reception**

Including the inaugural Super’s Got Talent competition

Tuesday 20 March, 2012

9:00am – 10:15am

Plenary #4:

Ageing and the Pre and Post retirement dialogue continues

As more and more Australians are nearing retirement, what does this mean for Australia, our workforce and super funds? With the introduction of MySuper, the industry has been urged to go back to the drawing board. This session will identify the real risks facing member’s needs and outcomes, the key shortcomings of existing pre and post retirement architecture, the impact of MySuper and most importantly the consequences for our ageing population.

Panel:

Paul Costello, Chair, Stronger Super Peak Consultative Body
Mike Drew, Professor of Finance, Griffith Business School, Griffith University
Nick Callil, Head of Post Retirement Solutions, Towers Watson Australia
Michael O’Neill, Chief Executive Officer, National Seniors

10:15am – 10:45am

Morning Tea

proudly supported by our Silver Industry Partner



10:50am – 11:30am Parallel Stream #2:

GPS Stream

The Trustee Board of the Future

As the industry develops and funds grow into large financial services firms, the demands on trustees will change and



the make-up of boards and skills required will need to evolve. This session will consider different board structures and the future of board configuration: The session will debate:

- Generalist v. specialist directors
- Representation of post-retirement members
- The role of independent directors and independent chairs
- The benefits of diversity
- The role of sponsoring organisations

Speakers:

TBA

Moderator: Gerard Noonan, President, AIST; Trustee Director & Chair, Media Super

MM Stream

Managing the Media

Superannuation funds increasingly need to manage their public relations and interaction with the media, which can make or break their reputation. Hear strategies and practical suggestions for super fund executives from a large, successful company that has vast experience in this field.

Speaker:

TBA

Invs Stream

Politicians vs. portfolios - what can you do about it?

Politicians and the spectre of deleveraging continue to hold sway over markets for the foreseeable future. What are the possible routes to redemption in the US and Europe, and what are the consequences if they are not taken? More importantly, which asset classes should bear up, and how can investment portfolios navigate through these uncertain times?

Speaker:

Dr. Jamil Baz, Chief Investment Strategies, GLG Partners

Op/Ad Stream

Auto Consolidation

This session will provide an analysis of implementation and strategic consequences of auto consolidation for insurers and administrators. This will be discussed in detail providing you with a greater understanding of the challenges facing the industry in the coming years.

Speaker:

TBA

ME Stream

Social Media – Part 1: When the tweet hits the fan

This is the first of three inter-linked Member Engagement Streams across CMSF this year. Whether we embrace it as the next step in member interaction or gradually get used to the idea, member engagement via social media is here to stay. We often hear about the cons of social media and how it can go ‘viral’ if an idea or action is misunderstood, misdirected or mis-timed. Today we will look at how you can avoid the potential pitfalls of social media.



- Do you react
- If so, how do you react
- How can you turn the opinions created to your advantage
- What resources do you point at the problem

Speaker:

TBA

11:35am – 12:40pm

Plenary #5:

Peer pressure - Just say no! Rethinking asset allocation

Do members care how Fund X performed v.s. Fund Y, or do they want to know when they can retire and what they can spend when they do? Would members be better served by funds huddling around a peer average or each taking responsibility of their own investments? Does the relative performance of Defined Benefit schemes v.s. Defined Contribution teach us anything? Is the current asset allocation regime appropriate – has it been modified since Keating first introduced the Superannuation Guarantee 20 years ago? Is our evolving understanding of risk captured? How can long term interests be safe guarded from short termism? Is that a novel idea? These questions, and more, will be taken up by the CIOs of two of Australia's premier funds.

Speakers:

Brad Holzberger, Chief Investment Officer, QSuper
David Neal, Chief Investment Officer, Future Fund

12:40pm – 1:40pm

Lunch

proudly supported by our Gold Industry Partner



1:45pm – 3:00pm Parallel Stream #3:

GPS Stream

APRA Update - Transition to MySuper

Superannuation funds will need to finalise their MySuper transition planning over the coming months. Understanding how the regulatory environment will evolve will be critical in that transition planning. APRA will provide insight as to how and when various stages of the evolving regulatory requirements will progress through to the introduction of MySuper.

Speaker:

Greg Brunner, General Manager, Supervisory Support Division, APRA

MM Stream

Managing Fraud

Peter Morris brings his considerable experience as a Director of KPMG Forensic and former Australian Federal Police Detective, to provide a lively and informative workshop where participants will gain an understanding of best practice in fraud risk management. This session will include fraud prevention and detection, internal controls, as well as what you should require from your outsourced providers to protect your members' superannuation money



from fraud.

Speaker:

Peter Morris, Director, KPMG Forensic

Invs Stream

Investment fee disclosure; be careful what you wish for

At present there is little consistency in the way that Funds measure and disclose total costs to members, with confusion reigning as members start to compare Funds on price, but can't do so with complete confidence. Does Fund x include the embedded management fees within Exchange Traded Funds in their disclosed fees? Does Fund y only include the outside layer Fund-of-Fund fees? Does it matter? David Hartley of SunSuper and Brett Elvish of Financial Viewpoint explore the issue, as well as considering whether, in an effort to minimise disclosed costs, Funds and Trustees can in fact achieve sub-optimal outcomes for members. The speakers will propose alternative models for tracking the true costs of our stewardship over members' investments. We will also hear from ASIC about their views on the status quo and of what Funds should be doing to achieve leading practice in the area.

Speakers:

David Hartley, Chief Investment Officer, SunSuper
 Brett Elvish, Director, Financial Viewpoint
 Gerard Fitzpatrick, Senior Executive Leader - Credit, ASIC

Op/Ad Stream

Fund Mergers

TBA

ME Stream

Virtual field staff

Is in person i.e. 'face to face' or 'one to many' still the way to go when it comes to member engagement? Are there better ways to get messages to members and can it be done without leaving the office? This session will look at the following options that may seem 'different' but could now be possible with changes as to how people want to receive information.

- Can you have a virtual field officer?
- Can all communications occur across internet?
- What is the situation that requires a "real" person?
- If your strategy of engagement is successful, how do you handle the extra demand for services?

Speaker:

TBA

3:00pm – 3:30pm

Afternoon Tea

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3:35pm – 4:45pm Parallel Stream #4:

GPS Stream

Strategic Planning for the Future

This session will focus on three key strategic issues in the not-for-profit superannuation sector. A panel will discuss the business case approach to tackling strategic issues, such as the case for merger.



Panel:

Winsome Hall, Trustee, Commonwealth Superannuation Corporation
TBA

MM Stream

Managing Efficiency Managing your priorities - Work Smarter: Live Better

Business coach and author, Cyril Peupion will deliver a practical and inspiring workshop that will challenge time-poor fund executives' work habits, and assist them to manage their conflicting priorities and re-align what they *are doing* with what they *should be doing*. Cyril's work has been attributed to improving business performance and changing people's life by transforming their day to day work habits.

Participants attending this workshop have the opportunity to win a copy of Cyril's book *Work Smarter: Live Better*.

Speaker:

Cyril Peupion, Director, Primary Asset Consulting

Invs Stream

After Tax investing: a consultant's perspective

We know that Fund members can't eat Pre-Tax returns in retirement. This session's outspoken consultants will share their views about why and how Funds can and should take action to increase their After-Tax returns. Each of the consultants has approached the area from a different angle, and will share their unique experience in the area, as well as providing both large and small Fund Trustees with tangible steps they can take, to measure and improve their Fund's After-Tax performance.

Speakers:

Raewyn Williams, Director, After-Tax Investment Strategies, Russell Investments
Ross Barry, Head of Portfolio Construction and Diversity, Australia, Towers Watson

Op/Ad Stream

Innovation & Compliance

TBA

ME Stream

Social Media – Part 2: Investment Trends: consumer sentiment research



This is the second of three inter-linked Member Engagement Streams across CMSF this year. To engage with members effectively it is important that you know what members are thinking. Investment Trends will present recent results of member research covering:

- Super Fund - Brand and fee awareness, drivers of satisfaction
- Investor sentiment
- Appetite and use of social media
- Trust
- Advice needs

Speaker:


TBA



4:45pm – 5:30pm	National Communities of Interest Meeting	
6:30pm – 7:00pm	Pre dinner drinks	
7:00pm till late	Conference Dinner proudly supported by our Platinum Industry Partner	
10:00pm till late	Pillar After Party proudly supported by our Bronze Industry Partner	

Wednesday 21 March, 2012

9:00am – 10:15am	Plenary #6: Infrastructure: Righting the wrongs Australia's infrastructure needs in the context of current policy and investment structures faced by superannuation funds. This session will provide both a policy makers and a practitioner's point of view. <ul style="list-style-type: none"> • Past vs. future investment models • Insourcing vs. outsourcing • Managed accounts vs. funds • Managing potential conflicts of interest. Panel: Sir Rod Eddington, Chair, Infrastructure Australia Mike Fitzpatrick, Chair, Infrastructure Australia Group Garry Weaven, Chair, Industry Funds Management
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10:15am – 10:45am	Morning Tea proudly supported by our Silver Industry Partner	
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10:50am – 11:40am Parallel Stream #5:	
GPS Stream Best practice in Fund Governance This session will discuss some gold standard practice examples in the governance of not-for-profit superannuation funds.	Speaker: Kaye Wheatley-Brown, Manager Compliance & Risk, VicSuper
MM Stream TBA	
Invs Stream TBA	



Op/Ad Stream
Stronger Super
 TBA

ME Stream

Social Media – Part 3: Hypothetical case study

This is the last of three inter-linked Member Engagement Streams across CMSF this year. A panel of fund representatives from different business units discuss how they would handle a social media issue that has gone 'viral'.

- Who has responsibility for responding?
- Is not responding an option?
- Is the answer containment or education?
- Can the situation be turned into a positive?

Panel:

Karen Volpato, Marketing Manager, First State Super
 TBA

11:45am – 12:45pm	Plenary #7: TBA
12:45pm – 1:00pm	Conference close
1:00pm Light Lunch proudly supported by our Gold Industry Partner	