Melbourne Professional Development Day | 15 May 2025

The Langham | Clarendon Ballroom
1 Southgate Ave, Southbank

Session time	Session title	Presenter	Company
8.30 – 9.00 am	**Registration and Arrival**	**Tea/Coffee**	
9.00 – 9.10 am	**Welcoming Address**	**Sarah Congdon** **Regional Manager**	**WT Financial Group**
9.10 – 9.55 am	**Digital intelligence & consumer mega-trends shaping tomorrow's advice** This presentation explores how technology combined with human expertise is transforming financial advice and life insurance. It examines the impact of health and consumer trends, highlights technological advancements, and shows how intelligent processes enhance decision-making, client engagement, and efficiency, positioning advisers at the industry's forefront.	**Adam Crabbe** **Risk Strategy Specialist**	**Zurich**
9.55 – 10.40 am	**Top Considerations for Financial Advisers 2025** Financial advisers are experiencing the effects of major regime changes and economic super-cycles, and it's becoming increasingly difficult to protect investment portfolios from market uncertainty. Understanding what's 'beneath the hood' can help advisers avoid hidden correlations. In this session, Mercer will discuss what genuine diversification looks like, the true cost of diversification, and whether the portfolio is at risk of compounding risks through exposure.	**Andrew Stewart** **Manager Selection Leader**	**Mercer**
10.40 – 11.00 am	**Morning Tea Break**		
11.00 – 11.45 am	**Burnout – a post pandemic fallout** This session explores the prevalence rate of the burnout syndrome and ADHD diagnosis, together with the cost of these conditions on the workforce and the individual. The primary objective is to understand how they are diagnosed via clinical medicine and what the potential underwriting outcome will be. With real-life claims scenarios, we delve into specific scenarios at the time of underwriting and claim stage.	**Luke Rizkalla** **Retail Underwriting Senior Manager**	**AIA**

11.45 – 12.45 pm	**Smart Referrals: Building a Network That Delivers** Referrals remain one of the most effective growth levers—if done well. This panel will explore how advisers can identify the right partners, structure mutually beneficial relationships and maintain consistent referral flow. Learn how to grow your client base through referrals without cold leads or costly and ineffective marketing.	**Adviser Panel Moderated by Keith Cullen**	
12.45 – 1.45 pm	**Lunch**		
1.45 – 2.30 pm	**Private Credit and Dividend Income: The case for both in client portfolios** Hear an update on the current Private Credit market and the outlook for ASX dividend income. Each speaker will provide insight into strategies and perspectives on the big topics and news in their respective asset classes.	**Andrew Lockhart** **Managing Partner** **Dr Don Hamson** **Managing Director**	**Metrics Credit Partners** **Plato Investment Management**
2.30 – 3.15 pm	**Advice trends and retail broking insights** Explore the latest developments shaping financial advice and retail broking sectors. This session will highlight emerging client expectations, evolving regulatory dynamics, and shifts in market behaviour – equipping advisers with practical insights to stay competitive, responsive and forward-thinking in a changing advice environment.	**Paul Ashworth** **Investment Specialist**	**Desktop Broker**
3.15 – 3.45 pm	**Group Update/Q&A Session**	**Keith Cullen** **Managing Director**	
3.45 – 4.00 pm	**Wrap-Up | End of Day**		
4.00 – 5.00 pm	**Please join us for drinks**		

To attend in person please register your attendance at:

Melbourne PD Day In-Person Registration

To watch all sessions via livestream and participate in Q&A remotely please register your attendance at:

Melbourne PD Day Live Stream

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