



Sydney Professional Development Day | 26 March 2026

Whitely Ballroom | Amora Jamison Hotel

11 Jamison St, Sydney

| Session time | Session title | Presenter | Company |
|------------------|--|---|--------------------|
| 8.30 – 9.00 am | Registration and Arrival | Tea/Coffee | |
| 9.00 – 9.10 am | Welcoming Address | Justin Baratta Regional Manager | WT Financial Group |
| 9.10 – 9.55 am | The Pre-Assessment Paradigm Pre-assessment has become one of the most valuable tools in a risk adviser's toolkit. This session offers practical insights to build confidence and sharpen your approach to client conversations before an application begins. Through real-world scenarios covering common and emerging medical conditions, you'll explore how different health profiles intersect with underwriting decisions across life, TPD, trauma and income protection. | Adam Crabbe Risk Strategy Specialist | Zurich |
| 9.55 – 10.40 am | Trust by Design: Applying Ethics in Retirement Advice Turn ethics from theory into a practical edge. In this engaging session, you'll tackle real retirement advice dilemmas, debate trade-offs, and pressure-test your judgement. Through hands-on case studies and interactive discussion, you'll learn how ethical obligations shape retirement income strategies, product choices, and decisions that safeguard long-term client outcomes—so you can give advice that's both compliant and compelling. | Esabel Thinnakone Technical Services Manager | Allianz Retire+ |
| 10.40 – 11.00 am | Morning Tea Break | | |
| 11.00 – 11.45 am | The Digital Advantage: How Tech is Transforming Client Relationships Technology is reshaping how advice practices operate. Discover how the right digital tools can improve efficiency, enhance client interactions, and support sustainable growth. In this session, we'll explore innovations such as digital fact-finds, holistic cashflow modelling, and practical AI applications – showing how they can streamline workflows, improve the client experience, and position your practice for success in 2026. | Michael Stevanovski Advice Solutions Lead | Morningstar |

11.45 – 12.45 pm

The Referral Engine

Most advisers say referrals are their best source of new clients — but few have a deliberate strategy behind it. In this panel, we sit down with advisers who have built consistent referral pipelines through centres of influence, client advocacy and community involvement. They'll share what's actually working to generate inbound enquiry and how you can apply it in your own practice.

Adviser Panel Moderated by Keith Cullen

12.45 – 1.45 pm

Lunch

1.45 – 2.30 pm

Five Forces Reshaping Investing for the Second Half of the Decade

This session unpacks the five big forces reshaping investing in the second half of the decade — from AI and shifting diversification dynamics to changing capital formation, retail-driven flows and a more fragmented global backdrop. We'll translate these themes into how portfolio construction, governance and client conversations may need to evolve to stay resilient and relevant.

Andrew Pease
Chief Investment Strategist

Russell Investments

2.30 – 3.15 pm

AI: The Biggest Opportunity in Markets

AI has the potential to reshape competitive dynamics across almost every industry — but what does that actually mean for investor portfolios? Anthony Doyle will cut through the hype, explain what AI is in practical terms and explore the opportunities and risks it presents, including market concentration, valuations and the behavioural pull of performance chasing.

Anthony Doyle
Chief Investment Strategist

Pinnacle

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:

[Sydney PD Day In-Person Registration](#)

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

[Sydney PD Day Live Stream](#)

