



ADVISER

CONFERENCE 2026

9–11 September | Novotel Sunshine Coast Resort

ADVISER CONFERENCE | SHUTTLE SERVICE

We will be operating a complimentary shuttle service between Ramada by Wyndham, Marcoola Beach Resort, Sand Dunes Resort and Novotel Sunshine Coast Resort throughout the conference. **Guests can access the shuttle at the main entrance of each resort.**

Wednesday 9th September

5:00pm – 6:30pm (Transfers to arrive at welcome drinks by 7pm – last hotel pick up 6:30pm)

9:30pm – 11:30pm (Last transfer leaving Novotel 11:30pm to return to hotels by 12am)

Thursday 10th September

6:40am – 8:00am (Transfers from hotels to Novotel resort for Conference)

5:00pm – 6:30pm (Transfers to arrive at dinner by 7pm – last hotel pick up 6:30pm)

10:30pm – 11:30pm (Last transfer leaving Novotel 11:30pm to return to hotels by 12am)

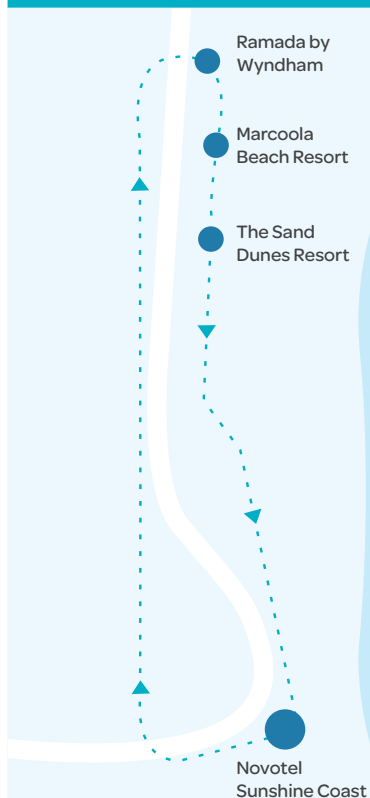
Friday 11th September

6:50am – 8:00am (taking guests and luggage to Convention Centre) **Airport transfers from Convention Centre departing:**

11:15am / 12:30pm / 1:15pm / 2:15pm

Passengers intending to use this service should **check out of their hotel before attending the conference sessions and bring their luggage with them.** Luggage can be stored either at the Convention Centre or with the Novotel Sunshine Coast Resort reception, depending on your departure time.

The complimentary shuttle service will loop between these pickup and drop off points. A full loop takes approximately 30 - 40 minutes.



Please note: there will be no shuttle service between the accommodation properties and the conference venue after 8:00am on Friday.

AGENDA | WEDNESDAY 9TH SEPTEMBER | MINYAMA ROOM

11:30am **Registration opens for Adviser Elevate Program**

12:00pm **Networking lunch**

1:00pm **4S Framework for effective client communication**

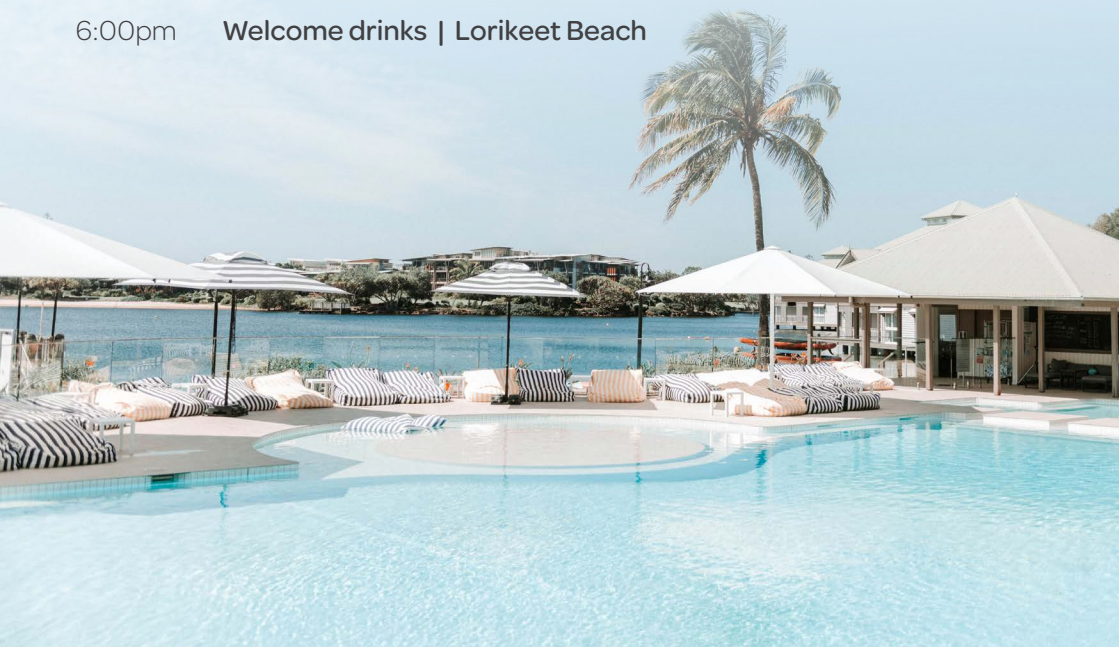
A research-backed framework of scripts, stories, sketches and supplements for turning client conversations into ones built on clarity, confidence and deeper connection.

2:45pm **Afternoon tea**

3:15pm **Efficiency by design: smarter portfolio construction**

How to build an investment philosophy and put it into practice: asset allocation, core-satellite, active versus passive, and blending direct equities into a model portfolio.

6:00pm **Welcome drinks | Lorikeet Beach**



AGENDA | THURSDAY 10TH SEPTEMBER | MINYAMA ROOM

- 7:40am **Registration opens**
- 8:00am **Arrival tea & coffee**
- 8:30am **Conference welcome & opening address**
- 9:30am **Beyond the budget: rethinking how we invest for clients**
Moving beyond the Federal Budget headlines to rethink how we invest for clients, followed by audience Q&A.
- 10:30am **Morning tea**
- 11:00am **Path to high performance: multi-channel growth approach**
A hands-on workshop on the practical levers behind stronger performance and sustainable revenue growth.
- 12:00pm **Lunch**
- 1:00pm **Primary drivers of capacity & growth**
Unpacking why client referrals are the largest untapped growth lever, the “referral gap” holding advisers back, and a practical framework for asking for introductions.

- 1:45pm **Your value proposition, reimagined for intergenerational wealth transfer**
Rethinking how you engage and retain clients through the great intergenerational wealth transfer.
- 2:30pm **Afternoon tea**
- 3:00pm **Technology and AI: adviser tech in practice**
How advisers are putting technology and AI to work day-to-day, followed by audience Q&A.
- 4:00pm **Keynote speaker Dr Matt Agnew: are we being replaced? AI, automation and the future of human potential**
A look at how AI is reshaping work, home and society, and whether it will diminish or expand human potential.
- 5:00pm **Day one wrap-up and close**
- 6:00pm **Cocktail hour**
- 7:00pm **Years of Service Awards dinner**
Celebrate the milestones and achievements of Morgans advisers.

AGENDA | FRIDAY 11TH SEPTEMBER | MINYAMA ROOM

8:00am **Registration opens**

8:30am **Arrival tea & coffee**

9:00am **Conference opens**

9:10am **Advising clients in a world of war, uncertainty and the AI revolution**

A panel on guiding clients through geopolitical and technological change, followed by audience Q&A.

10:00am **The investor's lens: what separates a great IPO from the rest**

What to look for when assessing a new listing: the quality markers, red flags and valuation discipline that separate a strong IPO from the rest.

10:30am **Morning tea**

11:00am **Managed accounts: advice done right**

How to get managed accounts right as regulatory scrutiny grows, keeping your advice compliant and firmly in clients' best interests.

11:30am **Communicate with influence: shaping conversations, relationships and outcomes**

Practical tools, strategies and confidence to navigate challenging client conversations, influence decisions and strengthen relationships.

12:25pm **Networking lunch**

VENUE MAP | NOVOTEL SUNSHINE COAST RESORT



SPONSORS FLOOR PLAN

THURSDAY 10TH SEPTEMBER | ARRIVALS LOUNGE

Bump in time from 7:00 am



FRIDAY 11TH SEPTEMBER | MINYAMA ROOM 3

Bump in time from 7:30 am



Thank you to all of our sponsors

GOLD SPONSORS



AORIS



ausbill

BARINGS



FNZ

HUB²⁴

L1 GROUP

LAZARD
ASSET MANAGEMENT



WHITEFIELD



Schroders



Vanguard

Wilson
Asset Management

SILVER SPONSORS



Avantis Investors
By American Century Investments*

Centuria



etfshares

GLOBAL X
by Mirae Asset



J.P.Morgan
ASSET MANAGEMENT

MA
Financial Group

PIMCO



BRONZE SPONSORS

AGP|WCM

