"Think Big" is the theme for the 2012 Forum.

We must Think Big if we are to successfully navigate the short-term turmoil whilst preparing for the long-term structural changes facing Australia and the global community. How can we manage the risks, capitalise on the opportunities and push the boundaries to continue to add value to our industry and to the millions of Australians who entrust their money to us?

financial services forum

Actuaries Institute

30 April – 1 May 2012 Crown Promenade, Melbourne

The Forum program features six plenary sessions and 48 concurrent sessions on a broad range of topics.

Registration choices include the option of sharing a registration between two delegates. Employers can now obtain maximum value by registering two employees to attend on separate days. A discounted registration fee is also available for full-time students.

Register by 6 April and take advantage of the earlybird discount.

Register Online – www.actuaries.asn.au/FSF2012

The Forum attracts Actuaries and other professionals from a wide spectrum of practice areas in the financial services industry including; • banking • finance • financial planning • investment • life insurance • risk management • superannuation • wealth management.

Todd Sampson

Chris Ryan

John Edwards

Tony Davis

Alex Twigg

Brian Bissaker

Tony Lally

Marc Lieberman

Jeremy Cooper

Plenary Speakers

Keynote Address:
The Big Picture
Todd Sampson
CEO, Leo Burnett Sydney

Plenary 1
***Charting a Course Through the Global* Economy,**
Chris Ryan
Former Head of Asian and Australian investment management companies
John Edwards
Visiting Fellow, Lowy Institute, and Member, RBA Board

Plenary 2
The Digital Revolution
Tony Davis
Director, Quantium
Alex Twigg
General Manager, UBank

Plenary 3
Reactions to Retirement
Brian Bissaker
CEO, Colonial First State
Tony Lally
CEO, Sunsuper
Marc Lieberman
CEO, MetLife
Jeremy Cooper
Chairman, Retirement Income, Challenger

Plenary 4
Gimme Gimme... A Guide to Consumer Needs
Michael Pennisi
Chief Strategy Officer, QSuper
Pauline Blight-Johnston
Managing Director, RGA Reinsurance Company of Australia
Melanie Evans
Head of Superannuation and Platforms, BT Financial Group

Plenary 5
The Hard Sell
Paul Barrett
General Manager Advice and Distribution, ANZ
Debby Blakey,
Deputy CEO, HESTA Super Fund
Andrew Gale,
Former CEO & Managing Director, Count Financial

Plenary 6
Leveraging Enterprise Risk Management to Shape Strategy – a Board Perspective
Greg d'Arville
Principal, CRG Essentials
Dick Morath
Chairman, GWM Advisor Services

Program at a Glance

Business sessions cover two days and include two buffet lunches and a networking cocktail party. Full details at: **www.actuaries.asn.au/FSF2012**

Monday 30 April

Sessions	9.00am – 5.30pm
Seated Buffet Lunch	12.40pm – 1.40pm
Networking Cocktail Party	5.30pm – 8.30pm

Tuesday 1 May

Sessions	9.00am – 5.30pm
Seated Buffet Lunch	12.35pm – 1.35pm
Airport Bus	6.00pm

"Given the different plenary speakers it is an opportunity to hear commentary from high profile leaders on the current environment and the potential commercial and other implications for the industry over the next few years."
– previous delegate

"Another great conference, content consistently of high standard."
– previous delegate

Register Online – www.actuaries.asn.au/FSF2012

Michael Pennisi

Pauline Blight-Johnston

Melanie Evans

Paul Barrett

Debby Blakey

Andrew Gale

Greg d'Arville

Dick Morath

Topic Snapshot

Thinking Big
- Living Until 120: the Implications for Absolutely Everything
- Fundamental Change in the Global Economy and its Impact on Australian Actuaries
- How to Think Big
- Leadership
- Think Big by Thinking Micro

Life Insurance
- Key Findings of a Recent Survey of Pricing Practices
- Disability Income – Have We Learnt Anything? and Where to Next?
- ICAAP – Can This Spawn Innovation? and What Should Actuaries Do About It?
- Group Insurance – Where Does the Operational Risk Lie?
- Implementing Daily Solvency Monitoring – a Case Study
- International Solvency Regimes for Annuity Markets

Superannuation and Retirement
- Five Thoughts on Australia's Ageing Population
- Reforming the Age Pension
- The Lifetime Harvesting Plan: Annuities with Sharing of Mortality and Investment Risks
- APRA Prudential Standards for Superannuation
- Crediting Rates or Unit Prices – Lessons Learned in These Volatile Times
- Actuarial Challenges in Defined Contribution Schemes
- Are Defined Benefit Funds still Beneficial?

Analytics and Marketing
- Financial Services Applications for Customer and Business
- Google Insights for Financial Services
- Predictive Analytics Applications in Retail Banking
- Cross-Sell: The Growing Need to Diversify
- Frequent Flyer Analytics – The Link Between Loyalty and Financial Services

Financial Planning
- Financial Planning Frameworks of the Future
- Implications of the FOFA Reforms
- FOFA Opportunities and Challenges

Investment and Markets
- Financial Services Market Update – Post GFC
- Latest Developments in Risk Management, Hedging and Capital Markets for Insurers
- How Capital Markets Can Help You Manage Meta-Risks?
- Squeezing the Lemon – Driving Life Insurance Profitability in a Low Return Environment
- The Role of the Infrastructure Asset Class in Superannuation Funds in 2022
- The Lifecycle Investing Debate
- Catastrophic Mortality Bonds: An Effective Hedge?

Risk Management
- Developing Risk Management Governance at a Not for Profit – a Case Study
- The End of the Equitable – a Case Study
- ERM: Theory, Practice and the Actuary
- Developments in the Application of Complex Systems to ERM and Actuarial Work
- Measuring and Managing Risk Culture
- Operational Risk + Actuaries = Big Opportunity + Big Challenge

Banking
- Fresh Insights – Australian/NZ Home Lending Default Risk
- House Price Risk Models
- Liquidity Risk Management

Health Insurance
- Capital Issues for a Mutual Health Fund in Australia
- Health Costs, Ageing, Superannuation

Venue

Crown Promenade
8 Whiteman Street, Southbank, VIC, 3006
T: +61 (0) 3 9292 6968

Accommodation

A special delegate rate has been arranged at the Crown Promenade. Rates start from AUD$235.00 per night including GST. When making a reservation, please quote booking reference Financial Services Forum to receive this rate.
The discounted rate is available for three nights prior and three nights after the Forum if you wish to extend your stay.

Please book accommodation direct with the hotel via the Institute website: **www.actuaries.asn.au/FSF2012**

Or via phone by contacting:

David McFarlane
Group Reservations Coordinator
Crown Promenade Hotel
8 Whiteman Street Southbank 3006
T: +61 (0) 3 9292 6688
F: +61 (0) 3 9292 8128
E: groupreservations@crownmelbourne.com.au

"Excellent program of forward-looking topics; I was stimulated and inspired "

– previous delegate

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Why attend?

1. Large variety of **relevant topics** being presented, irrespective of your area of specialisation, there will be strong content relevant to you.
2. **High profile speakers.**
3. Hear from the financial services industry's **big thinkers** about where we are going.
4. Discover the **interesting work** that actuaries are involved in within the financial services industry.
5. Engage in vigorous **debate** with other professionals.
6. Cost-effective registration fee with many **opportunities** to gain new knowledge on a variety of topics.
7. Attend a Forum which is a **professionally rewarding** experience.
8. Learn the **latest techniques**.
9. Learn about the latest **economic trends**.
10. Increase your understanding of APRA's new capital requirements and how other companies are **dealing with these challenges**.
11. Understand how **different risk professionals** deal with ICAAP requirements.
12. Learn how **experience** is developing for claims and lapses across the industry.
13. Hear about the **latest trends** in superannuation and retirement.
14. Understand how risk management is **relevant** to you in your role.
15. Understand what **financial services** customers want.
16. The opportunity to discuss **research** happening in the market place.
17. Build **relationships** and **network** with other financial services professionals.
18. Stay ahead and gain **valuable CPD hours.**
19. Learning and development for both the **employer/employee** i.e. general professional development.
20. **Be inspired** by the knowledge gained at the Forum leading to higher motivation and productivity when you return to the office.