



### **MICHAEL BAKER**

**FOUNDER AND DIRECTOR, WAYFARER INVESTMENT PARTNERS**

Michael has over 20 years of experience in the financial services industry with roles spanning across distribution, management, and advice. He brings extensive investment sales experience and is responsible for leading Wayfarer's distribution effort into the Retail, Wholesale and Family Office markets and building assets for our investment manager partners.

Michael has held senior distribution roles at Macquarie Group and Charter Hall.



### **CHRIS BLAXLAND WALKER**

**GENERAL MANAGER DISTRIBUTION, CLEARVIEW WEALTH LIMITED**

Christopher Blaxland-Walker is General Manager Distribution at ClearView Wealth Limited. He has a deep understanding of the life insurance, wealth management and financial advice industry, gained through years of being on the ground in advice practices as well as working in senior management positions.

He was elected a fellow of The Royal Society of Arts (FRSA) in 2018 supporting a platform for bright new ideas, innovative projects, a diverse network of like-minded people and encouragement for social change.



### **PROFESSOR SARATH DELPACHITRA**

**CHAIR AIOFP, AIOFP**

Professor Sarath Delpachitra currently serves as the Director of the UTS Business School in Shanghai. He has previously served as the Deputy Dean of the Flinders Business School. He specialises in banking, economics and finance issues in Australasian region and has previously served in World Bank, Asian Development Bank, ILO and DEFAT as an International consultant. He has published extensively in refereed journals and professional publications and he was the recipient of Australian Government (Australia Future Unlimited) by granting him the Australian Alumni Excellence for Research & Innovation Award in 2013.

He has also served as a senior executive in the General Treasury in Sri Lanka. He has interacted with policy-makers as a resource person in several Asian countries such as India, Vietnam, People's Republic of China, Singapore, Malaysia and Sri Lanka. He is also serving as the Managing Editor of the Australian Economic Papers; an internationally ranked journal in the field of economic and finance. He teaches applied finance and economics and economic reasoning for public policy and guided over 20 doctoral candidates for completion. His professional memberships include, a Fellow (Finance and Securities Institute of Australia –FinSia and a Fellow – CPA (Australia).



### **MATTHEW ESLER**

**MANAGING DIRECTOR & CEO, PADUA SOLUTIONS**

Matthew Esler is the Managing Director & CEO of Padua Solutions, driven by one clear purpose: empowering advisers to build stronger futures for more Australians. Under Matt's leadership, Padua delivers market-leading technology, AI, data, and services to financial advice firms, licensees, platforms and super funds - enabling advice delivery that is integrated, efficient, engaging, and compliant.



### LUKE FITZGERALD

#### PARTNER | HEAD OF WEALTH MANAGEMENT, MERCER

In his role as Head of Wealth Management, Luke is responsible for providing support to Australian wealth clients including large licencees, trustees, platforms, private banks and advisory firms.

Prior to joining Mercer in July 2010, Luke gained 11 years of experience in financial services. This includes his time at van Eyk where he managed relationships with major wealth management corporations and headed up the establishment of van Eyk in New Zealand; and at AMP where he was national business development manager for Hillross and was responsible for the acquisition of both practices and financial advisers. Luke has a strong distribution background in a variety of industries in Australia and New Zealand, as country manager and business development manager, respectively.

Luke holds Master of Business Studies (Distinction) from Massey University, a Bachelor of Science (Honours) from University of Canterbury, and a Post-Graduate Diploma in Management (Distinction) from Massey University.



### JONNY FRY

#### CEO, TEAMBLOCKCHAIN LTD

Headed the Digital Assets Strategy for ClearBank Ltd, established in 2015 becoming the first bank in over 250 years to be regulated as a clearing bank in the UK. Jonny founded Teamblockchain Ltd, a research and publishing firm that since March 2018 has produced Digital Bytes, a weekly analysis focused on the commercial opportunities of using blockchain technology and digital assets. He is a Deputy Chair of TURN, a reporting platform for the asset management industry, director of London Digital Escrow Ltd and has been an advisor to a number of other firms in the UK and overseas. Jonny was Chairman at Gemini Capital UK, which owned a Dublin based fund administration. While Chair, assets grew 10-fold, and the business has now been successfully sold. He has been on the boards of a variety of regulated and unregulated organisations in the U.K. and overseas, as well as being a director of a number of private and quoted companies in a variety of different industries, managing corporate and reputational risk.

For over 20 years Jonny was CEO of Premier Asset Management Plc, a London Stock Exchange-listed asset management company that he co-founded and floated.



### DAVID HARRIS

#### MANAGING PARTNER, BLUE HARBOUR CAPITAL

Blue Harbour structures and finances internal succession for independently owned businesses, giving owners a fair exit, advisers a genuine path to ownership, and clients continuity of trusted advice. David brings over 20 years of experience as an entrepreneur and operator across North America, Asia and Australia, across finance, manufacturing, marketing and digital technologies. Through financing and exiting his own businesses, private equity investments and sell-side advisory, David's expertise spans the full lifecycle of SME capital needs. He has advised businesses, policymakers, and investors on organisational structure, commercialisation and strategy across Australia, China, Japan, and Southeast Asia. He speaks conversational Chinese and embarrassingly poor French.



### **DOUG HUGHES**

#### **FINANCIAL CONSULTANT, COMPREHENSIVE FINANCIAL CONSULTANTS**

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Doug Hughes joined the Comprehensive Financial Consultants Team in July 2003 and is the Vice President of Comprehensive Financial Consultants and an investment consultant. Doug's primary responsibility is overseeing client accounts and helping to shape their savings for the future. A big believer in creating financial freedom for oneself, he concentrates on creating this for his clients so they can feel confident in their financial situation. Hughes co-hosts classes at Ivy Tech Community that are geared towards financial readiness for retirement. These classes simplify complex concepts so that the average person preparing to retire can fully understand their options. He was also a visiting lecturer at Indiana University's School of Public and Environmental Affairs, teaching courses on personal finances. A native of Bloomington, Indiana, Doug Hughes received his bachelor's degree in Theology from Indiana Bible College. After graduation, Doug began working in the financial services industry.



### **DR KATHERINE HUNT**

#### **GLOBAL KEYNOTE SPEAKER COACH**

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Katherine combines her expertise in client psychology with her passion for AI to lead global growth projects with impact. Katherine is Australia's leading AI Ethics in Financial Planning expert, having built Masters courses on the topic, and authored textbooks and research papers on ethics. Katherine has experience working as a financial planner with Aspire Financial Planning, and Katherine holds a PhD in "The Law and Economics of Microfinance" from Erasmus University of Rotterdam, University of Hamburg, and the University of Bologna. Katherine has a strategic view of important issues, granted by a Bachelor of Psychological Science, alongside her Bachelor of Commerce and First Class Honours in Finance. Katherine's focus is in helping practices achieve the growth they are looking for through AI efficiency, and automating the client experience. Katherine has visited 70 countries (so far), and surfed in more than 20 of those.



### **SAM KEKOVICH**

Sam Kekovich is an Australian media personality, sports commentator, Australian meat lobbyist and former Australian rules football player.

He is well known for his controversial behaviour, both on and off the field, and most recently for his series of satirical advertisements as the spokesman for Meat and Livestock Australia (MLA) to promote the lamb industry. And he is practically an honorary member of the AIOFP now on his fourth appearance!



### **HUGH MACNALLY**

**EXECUTIVE CHAIR-PORTFOLIO MANAGER-CIO, PPM**

Hugh is the founder of PPM and the custodian of its investment philosophy and process. During a 40-year career in investment management, Hugh has navigated several major investment cycles —experience that has reinforced the disciplined, research-driven approach PPM applies to every portfolio. He is responsible for the management of the Global Equities Growth Strategy and individual client portfolios. Prior to founding PPM, Hugh held senior portfolio management positions at several institutions. He is an alumnus of Harvard Business School



### **ARTHUR NAOUMIDIS**

**CEO, FOUNDATION PLATFORM SERVICES**

Arthur Naoumidis is a platform industry veteran and founder of Praemium, with over 40 years' experience across IT, banking and investment platforms. Arthur has played a key role in the development of Australia's platform and managed account landscape and brings deep expertise in platform design, distribution and adviser engagement.

He is currently leading the development of the Foundation Adviser Wrap for the AIOFP, focused on delivering a platform model that enhances adviser control, access certainty and commercial alignment for independent dealer groups.



### **NICOLE OTT**

**NATIONAL MANAGER – DEALER GROUPS & PLATFORMS, TRILOGY FUNDS**

As National Manager – Dealer Groups and Platforms at Trilogy Funds, Nicole is responsible for leading Trilogy's engagement strategy with dealer groups, IFAs and investment platforms across Australia.

A dynamic sales leader and communicator, Nicole brings many years of experience in the financial services industry to her role. She has a strong track record in business development, marketing, team leadership and mentoring.

Results-oriented, Nicole has delivered and exceeded revenue, growth and retention targets, even in challenging market conditions.



### **DARREN PETTIONA**

**EXECUTIVE DIRECTOR, STRATEGY, DASH TECHNOLOGY GROUP**

Darren has over 30 years' experience in the financial services industry and has been at the forefront of financial services technology. He currently serves as Executive Director of Strategy at DASH Technology Group, where he continues to drive innovation in the financial advice sector.

Darren was the founder and Chief Executive Officer of Advent Software Australia Pty Ltd (SS&C Technologies, USA), he subsequently co-founded Coin Software, a leading financial planning system that was acquired by Macquarie Bank. Following this, he played a pivotal role in the early development of HUB24, serving as Chief Executive Officer and guiding the platform's emergence as a significant player in managed accounts. He has also held non-executive directorships in various financial service and government entities including Charles Schwab Australia, Investorfirst Ltd, Allied Funds Management, van Eyk Research and TOTE Tasmania.

Under his strategic leadership, DASH has developed an integrated platform that streamlines the entire financial advice process – from client onboarding and fact-finding to scenario modelling, Statement of Advice (SOA) generation, and investment execution. This end-to-end solution enables advisers to deliver cost-effective, scalable advice, improving operational efficiency and client engagement.



### **LIONEL RODRIGUES**

**IFM SECURITIES**

Lionel is a Graduate Researcher at Deakin University in the Faculty of Business and Law/ Deakin Law School in the PhD (Law) program. He is active as a practicing financial planner and has completed the degrees of Master of Financial Planning and Master of Laws.



### **DAVID SARKIS**

**CEO, IEXTEND**

David Sarkis is a seasoned financial markets professional with over 35 years of experience across Australia, Japan and Hong Kong. With roots in actuarial studies, David built his career through investment banking — leading derivatives trading teams — before transitioning into multi-asset portfolio management and strategic asset allocation. He has held senior leadership roles at Merrill Lynch, Deutsche Bank and RBS, and served as CIO and CEO of Silver Tree Asset Management. Throughout his career he has contributed to global steering, risk and governance committees, advising on risk management, operations, technology and business growth. David is the founder and CEO of iExtend, a business dedicated to helping financial advisers and their clients access alternative capital solutions to sustain life insurance premium payments — particularly for clients facing vulnerability or affordability challenges.



### MAREE CRIDLAND

#### DISTRIBUTION MANAGER VIC, GENERATION LIFE

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Maree Cridland is a member of the Distribution team at Generation Life, with over a decade of experience in wealth management. She partners with financial advisers across the industry to deliver tailored investment and estate planning strategies, specialising in investment bonds and lifetime annuities. Maree was recognised as BDM of the Year at the Women in Finance Awards, and is passionate about building long-term adviser relationships and delivering value through education to assist advisers in delivering exceptional outcomes for their clients.



### DR JEFFREY SCOTT

#### HEAD OF ADVICE & STRATEGY, METLIFE AUSTRALIA

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Dr Jeff has worked for over 30 years in the Insurance industry. He is a regular media commentator on the topics of insurance superannuation, pensions and finance. Dr Jeff has lectured at the University of Technology Sydney (Investment and Financial Planning) and University of New South Wales (Taxation, Superannuation and Insurance).

Dr Jeff created the first terminal illness benefit for life insurance products in Australia. He has the following qualifications and certifications: Certified Financial Planner (FPA/FAAA), SMSF Specialist Adviser (SMSF Association), Fellow of the Taxation Institute of Australia, Graduate of the Australian Institute of Company Directors, Bachelor of Mathematics (U of Waterloo), Diploma of Financial Planning (FPA/Deakin), Master of Arts (UTS), Master of Education (UTS), Graduate Diploma of Advanced Taxation (UNSW), Master of Taxation Law (UTS), and Doctor of Philosophy in Taxation (UNSW).



### RAYMOND TAYLOR

#### DIRECTOR, REVERSE MORTGAGES

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Raymond is an experienced finance professional and licensed credit adviser with more than 40 years' experience across banking, finance, accounting and corporate governance. He holds a Degree in Economics, a Master of Commerce in Professional Accounting, and a Graduate Diploma in Company Secretarial Practice. Before spending the last decade specialising in reverse mortgages, Raymond built a diverse career spanning senior roles in banking and finance, including dealing rooms and loans administration. He owned his own tax practice as an accountant for ten years. He later became a professional director and company secretary. Raymond is passionate about the positive impact reverse mortgage lending can have on people's lives.



### KEVIN SHEEDY AO

Kevin Sheedy is a legend of the Australian Football League, with a career spanning over five decades as a player, coach, and mentor. Across more than 1,000 games, Kevin has won eight premierships and shaped the AFL with his vision, innovation, and leadership.

From 1967 to 1979, Kevin played 251 games with Richmond Football Club, contributing to premiership victories in 1969, 1973 and 1974, and serving as skills coach for the 1980 premiership team. In 1981, he was appointed Senior Coach at Essendon Football Club, where he coached a record 635 matches over 27 years, guiding the club to 19 finals series and four premierships (1984, 1985, 1993, 2000), along with six night grand finals. Kevin returned to Essendon in 2015 as General Manager, Commercial Development and Innovation.

Kevin's impact extends beyond coaching. He initiated the ANZAC Day Match between Essendon and Collingwood to honour Australia's service personnel, now a marquee AFL event, and introduced the Dreamtime match to celebrate Indigenous players. He also launched the AFL Country Match to raise awareness of the challenges faced by regional communities. Kevin was the inaugural coach and later Director of the GWS Giants, leaving a lasting legacy at the club.

A member of the AFL Hall of Fame and recipient of the Order of Australia, Kevin holds life memberships at Richmond, Essendon, and GWS, and was elevated to Immortal status by Essendon in 2022. He has received Advance Australia Awards and honorary doctorates from Australian Catholic University and the University of Western Sydney.

Kevin is the author or co-author of nine books, including *The 500 Club*, *Stand Your Ground*, and *Icons of Footy*. He is a sought-after keynote and after-dinner speaker, providing insights into leadership, team-building, innovation, and high performance.

Beyond football, Kevin is a community leader and mentor. He founded AFL SportReady, which has provided employment and education opportunities for over 14,000 young Australians, including 2,000 Aboriginal and Torres Strait Islanders. He is also an ambassador for the Bravery Trust, supporting veterans and their families, and serves as an Australian Apprenticeships Ambassador.

Kevin Sheedy is a man of vision, innovation, and influence—a sporting icon, a community champion, and an inspirational speaker for audiences across all sectors.



### GEORGE WALKER

#### MANAGING PARTNER AND CO-FOUNDER, FIDUCIARY PARTNERS

George Walker is Managing Partner and co-founder of Fiduciary Partners. Launched in 2025 with Graham Rich, Deirdre Keown and Alex Haynes, the firm is a next-generation investments and wealth ecosystem built to provide a counterbalance to the consolidation reshaping Australian advice — working with licensees, Responsible Entities, independent Chief Investment Officers, and boutique, independently-owned advice businesses.

Having watched consolidation reshape the industry from inside one of the country's largest distribution businesses, George brings 25+ years at the centre of Australian wealth management to this mission, most recently as Executive Director of Investment Sales at Colonial First State.