

PROGRAM

CARE Coterie | October 2026



Fri 9th

Arrival & Check In

5:30pm Depart for Welcome Dinner

From QT Queenstown

Transfers to and from Stoneridge Estate will be provided.

6:00pm Welcome Dinner

Stoneridge Estate

10:00pm Reconnect with peers and settle into the weekend over dinner at Stoneridge Estate.

8:30am Registration & Coffee

QT Queenstown

Collect your name badge and have a coffee before we begin.

8:50am Welcome & Introduction

Simon Jeffrey-Bilich – *Head of Investments, Count*

An introduction to the program and the key ideas that will shape our time together.

9:00am Economic & Market Update

Andrew Papageorgiou – *Head of Bank Capital & Corporate Credit, Realm*

A macro overview of the global economic and market landscape, unpacking key trends, risks and opportunities shaping the investment environment.

10:00am Real Clients. Real Decisions – Acting with CARE

Rob McGregor & Grahame Evans – *CARE Investment Committee*

Test your thinking across real-world CARE scenarios, debate approaches with fellow advisers, and compare your decisions to the perspectives of the Investment Committee.

10:30am Morning Tea

11:00am Client Behaviour: Are We Learning, or Just Repeating?

Mark Brimble – *CARE Investment Committee*

Explore why clients repeat common mistakes during uncertainty and how advisers can apply behavioural insights to improve client engagement, and long-term outcomes.

11:30am The Enhanced Portfolio: E is for Evolution?

CARE Investment Committee

An interactive workshop focused on understanding what clients want and how the Enhanced component of CARE can continue to evolve to meet those needs.

Saturday 10th

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Saturday 10th

12:30pm Lunch

1:30pm **Riding the Economic Tail Winds**

Andrew Inwood – *Founder, CoreData*

A forward-looking presentation about how getting the next five years right will change your business forever.

2:30pm **CARE in Practice: What's Working, What's Next?**

Simon Jeffery-Bilich – *Head of Investments* & Joe Raad – *Head of GPS Wealth*

Review recent CARE initiatives and resources, hear how advisers are using them in practice, and shape what comes next.

3:00pm **Closing**

Simon Jeffery-Bilich – *Head of Investments, Count*

3:30pm **Depart for Surprise Experience**

From QT Queenstown

4:00pm **Secret Experience**

Details revealed on the day

5:00pm **Farewell Dinner**

Canyon Brewing

Transfers back to QT Queenstown will be provided.

Sun 11th

Queenstown at Leisure

Enjoy a free day in Queenstown before travelling to Christchurch ahead of Count.ed.