Count.ed

Day 1 – Arrival Monday 12 Oct

7:00am

Count Golf Day
Clearwater Golf Course
Golf attire
[View the Dress Code Guide →]

9:00am

Paragem Principal's Day
Met Lounge, The Tannery
Paragem MPs only

4:00pm

Pinnacle Event
Monarch Bar, King of Snake
2026 Pinnacle Leaders only

6:30pm

Welcome Evening
Riverside Markets
Smart casual
[View the Dress Code Guide →]

2026

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Day 2 Tuesday 13 October

9:00am	**Welcome**
9:40am	**Opening Keynote** Sir Graham Henry
10:40am	**Morning Tea**
11:25am	**The Art of Storytelling** Colonial First State
12:10pm	**Investment Update** Emmanuel Calligeris & Realm
12:55pm	**Lunch**
1:55pm	**Barry Lambert & CCF**
2:15pm	**Built, Broken, Rebuilt** PM Capital with Damien Fitzpatrick
3:00pm	**Close & Afternoon Tea**
3:30pm	**Phoenix Series Event** With Colette Werden at Ilex Café *Smart casual*
6:30pm	**Tribe Dinners** Christchurch Town Hall *Smart evening wear / cocktail attire* View the Dress Code Guide →

2026

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Day 3
Wednesday 14 October

8:45am **Welcome**

9:00am **Opening Keynote**
Simon Keustenmacher

STREAM SESSIONS

	All Roles Focused	Accounting Focused	Financial Planner Focused	
10:10am	**From Recovery to Relevance** Zurich & TAL *Count.ed Perspectives*	**The Big 6 Themes Shaping Advice Businesses for 2026** Evidentia *Count.ed Growth*	**Advice-Designed Retirement Income Solutions: From Philosophy to Framework** Challenger *Count.ed Growth*	**Future Proofing Your Business in the New Tax World** Centuria *Count.ed Insights*
MORNING TEA				
11:35am	**The Great Wealth Shift** Generation Life *Count.ed Insights*	**Avoiding the Code of Ethics Hall of Shame** Aware Super *Count.ed Impact*	**The Two Chapter Retirement Framework** Allianz Retire+ *Count.ed Insights*	**Div 296 - its here!** Accurium *Count.ed Tax & Strategy*
12:25pm	**From Insight to Action** Russell Investments *Count.ed Insights*	**Beyond the Headlines: Geopolitics and Markets** Betashares *Count.ed Perspectives*	**Working with the Connected Consumer** Netwealth *Count.ed Insights*	**Cyber Risk in 2026: Are You Keeping Up?** Priority Networking *Count.ed Growth*
LUNCH				
2:05pm	**From Portfolio Fit to Stock Pick** Dexus *Count.ed Impact*	**Demystifying Fixed Income: What Every Adviser Needs to Know** VanEck *Count.ed Perspectives*	**Rethinking Education Funding in a Shifting Tax Landscape** Futurity *Count.ed Perspectives*	**The Great Reset: EV's Disrupt the Rules of Global Auto** Loftus Peak *Count.ed Perspectives*
2:55pm	**From Panic to Progress: Behavioural Coaching for Volatile Markets** Morningstar *Count.ed Perspectives*	**Decoding Benchmarks and the Realities of Managing Client Portfolios in 2026** MFS *Count.ed Perspectives*	**Behind the Deal: M&A Case Studies** Count *Count.ed Growth*	**Rebuilding Income from the Ground Up - How Australian Public Credit is Redefining the Core Portfolio** Schroders *Count.ed Impact*

3:00pm **Emerging Advisers Session**

CLOSE & AFTERNOON TEA

6:30pm **Equity Partners Dinner**
The Atrium, The Tannery
Smart evening wear / cocktail attire
[View the Dress Code Guide →]

Evening at Leisure / Partner in Education Dinners

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Day 4
Thursday 15 October

STREAM SESSIONS

All Roles Focused | Accounting Focused | Financial Planner Focused

9:00am	**Professional Standards in Practice** Count *Count.ed Impact*	*No Session Scheduled*	**The Speed Trap: AI and Advice Process** Finura Group *Count.ed Growth*	**Equity in Retirement: Enhancing Sustainable Income for Today's Retirees** Ausbil *Count.ed Insights*	**Death and Taxes: Beyond the Final Return** Knowledge Shop *Count.ed Tax & Strategy*
9:50am	**The Deadly Sins of Investing** Pinnacle *Count.ed Impact*	**Ethics in Retirement Advice – Dilemmas vs Process** Acenda *Count.ed Insights*	**Unlocking Practice Performance in an AI-Enabled World** IRESS *Count.ed Growth*	**Lessons from the Quant Winter – Diversification through a Quant Value Lense** RQI & First Sentier Group *Count.ed Insights*	**CGT Strategies Post Budget Changes** TaxBanter *Count.ed Tax & Strategy*

MORNING TEA

11:15am	**The End of Fragmentation: Why Advice Needs an Ecosystem, Not More Tools** HUB24 *Count.ed Perspectives*	**Are the Portfolio Benefits of Index Investing Real or Are They an Illusion?** L1 Capital *Count.ed Perspectives*	**Building Smarter Managed Accounts: Insights from Wholesale Asset Consultants** Perpetual *Count.ed Perspectives*	**The Evolution of Data and AI in Equity Investing** Magellan *Count.ed Perspectives*	**Rewriting the Rules: Negative Gearing in a Post Budget Landscape** Knowledge Shop *Count.ed Tax & Strategy*
12:05pm	**Advice Through Uncertainty: Lessons from NZ & Australia** Milford *Count.ed Perspectives*	**Balancing Sustainability and Value – TPD Core** AIA *Count.ed Impact*	**What's Your Investment Philosophy?** Count & Vanguard *Count.ed Growth*	**Heavy Assets, Low Obsolescence: A Framework for the Physical Economy** Global X ETFs *Count.ed Impact*	**Trust Shake-Up: Making Sense of the Moving Pieces** TaxBanter *Count.ed Tax & Strategy*

LUNCH

1:45pm	**Barry Lambert Award**
2:00pm	**Pinnacle Leaders Announcement**
2:15pm	**Closing Keynote** TBA
3:15pm	**Close**
6:30pm	**Count.ed Celebration Evening** River Room, Te Pae Convention Centre

Please note: session content and timings are subject to change.

Choose Your Experience

From Day 3 onwards, breakout sessions are organised across five Count.ed streams to help you build a personalised conference experience.

Count.ed Perspectives

Perspectives that count. Real conversations, shared experiences, and ideas from across the profession.

Count.ed Growth

Your team. Your firm. Building what comes next.

Count.ed Insights

Your expertise. Your clients. The difference you make.

Count.ed Impact

Your expertise in action. Hands-on learning, practical tools, and solutions you can take back to your clients.

Count.ed Tax and Strategy

Staying ahead of change. Technical updates, practical guidance, and insights that count.

Count.ed Perspectives

Perspectives that count. Real conversations, shared experiences, and ideas from across the profession.

From Recovery to Relevance | *Zurich & TAL*
A panel session exploring the insurance landscape and the trends shaping how insurers, advisers and clients operate post a prolonged period of regulatory adjustment.

—

Beyond the Headlines: Geopolitics and Markets | *Betashares*
Explore how advisers and accountants can help clients make sense of geopolitical events without turning headlines into investment decisions, featuring Emmanuel Calligeris.

—

Demystifying Fixed Income: What Every Adviser Needs to Know | *VanEck*
Build a deeper understanding of fixed income investing and the issues advisers and clients are facing in today's market.

—

Rethinking Education Funding in a Shifting Tax Landscape | *Futurity*
Real adviser case studies exploring education funding strategies and how they can improve outcomes for clients across generations.

—

The Great Reset: EVs Disrupt the Rules of Global Auto | *Loftus Peak*
Examine the transformation of the global automotive industry and the opportunities and challenges arising from the transition to electric vehicles.

—

From Panic to Progress: Behavioural Coaching for Volatile Markets | *Morningstar*
Discover how behavioural coaching can help advisers guide clients through uncertainty and make better financial decisions.

—

Decoding Benchmarks and the Realities of Managing Client Portfolios in 2026 | *MFS*
Learn how benchmark construction influences portfolios and how advisers can position active management in today's environment.

—

The End of Fragmentation: Why Advice Needs an Ecosystem, Not More Tools | *HUB24*
Learn how integrated ecosystems, AI and automation are helping firms simplify advice delivery and improve efficiency.

—

Are the Portfolio Benefits of Index Investing Real or Are They an Illusion? | *L1 Capital*
Explore market concentration risk, passive investing and whether index investing remains as diversified as many investors believe.

—

Building Smarter Managed Accounts: Insights from Wholesale Asset Consultants | *Perpetual*
Hear how leading consultants approach the design, construction and evolution of managed account portfolios.

—

The Evolution of Data and AI in Equity Investing | *Magellan*
Discover how investment teams are using AI and technology to build more disciplined and adaptable portfolios.

—

Advice Through Uncertainty: Lessons from NZ & Australia | *Milford*
Hear from advisers across New Zealand and Australia on how they guide clients through uncertainty and market volatility.

Count.ed Growth

Your team. Your firm. Building what comes next.

The Big 6 Themes Shaping Advice Businesses for 2026 | *Evidentia*
Explore the six major trends shaping advice firms, client expectations and business models in the years ahead.

—

Advice-Designed Retirement Income Solutions: From Philosophy to Framework | *Challenger*
An interactive session focused on applying retirement income philosophies and frameworks to support better client outcomes.

—

Cyber Risk in 2026: Are You Keeping Up? | *Priority Networking*
A practical playbook for identifying, prioritising and managing cyber risk across people, systems, governance and data.

—

Behind the Deal: M&A Case Studies | *Count*
A discussion of real acquisition case studies across accounting and financial planning firms.

—

The Speed Trap: AI and Advice Process | *Finura Group*
Learn how firms are practically adopting AI across core business processes and what is delivering real-world results.

—

Unlocking Practice Performance in an AI-Enabled World | *IRESS*
Explore how AI is improving operations, productivity and trust across advice businesses and other industries.

—

What's Your Investment Philosophy? | *Count & Vanguard*
Learn how to build, articulate and consistently apply a clear investment philosophy for clients and your business.

Count.ed Insights

Your expertise. Your clients. The difference you make.

Future Proofing Your Business in the New Tax World | *Centuria*
A deep dive into alternative structures and opportunities for tax-efficient investing following the 2026 Budget proposals.

—

The Great Wealth Shift | *Generation Life*
Explore practical strategies and structures to help clients transfer wealth across generations with greater certainty, control and tax efficiency.

—

The Two Chapter Retirement Framework | *Allianz Retire+*
Discover a behavioural framework designed to help clients make more confident retirement decisions and improve advice outcomes.

—

From Insight to Action | *Russell Investments*
Learn how to turn client uncertainty into practical advice conversations, stronger engagement and better long-term outcomes.

—

Working with the Connected Consumer | *Netwealth*
A practical look at how advisers and support teams can better understand and utilise AI and technology tools within their business.

—

Equity in Retirement: Enhancing Sustainable Income for Today's Retirees | *Ausbil*
Explore how quality equity portfolios can deliver reliable and growing income streams to support retirement needs in an environment of longer lifespans and persistent inflation.

—

Ethics in Retirement Advice: Dilemmas vs Process | *Acenda*
Explore real retirement advice scenarios and help build the foundations of an ethical retirement advice philosophy through an interactive workshop.

—

Lessons from the Quant Winter: Diversification Through a Quant Value Lens | *RQI & First Sentier Group*
Examine historical "Quant Winter" periods and learn how those lessons can help advisers understand today's investment environment and diversification opportunities.

Count.ed Impact

Your expertise in action. Hands-on learning, practical tools, and solutions you can take back to your clients.

Avoiding the Code of Ethics Hall of Shame | *Aware Super*
Real-world case studies exploring how seemingly reasonable advice can unravel under the Code of Ethics and what advisers can learn from these examples.

—

From Portfolio Fit to Stock Pick | *Dexus*
Gain practical insights into global real estate securities, portfolio construction and assessing active global REIT strategies.

—

Rebuilding Income from the Ground Up: How Australian Public Credit Is Redefining the Core Portfolio | *Schroders*
Learn why investors are reassessing private debt exposure and how public credit may provide a more transparent and diversified source of income.

—

Professional Standards in Practice | *Count*
An annual update covering professional standards and key considerations for advisers.

—

The Deadly Sins of Investing | *Pinnacle Investment Management*
Explore the behavioural biases that influence investment decisions and the common psychological traps investors face.

—

Balancing Sustainability and Value – TPD Core | *AIA*
Understand how TPD sustainability has been impacted and how advisers can manage client expectations while delivering advice in clients' best interests.

—

Heavy Assets, Low Obsolescence: A Framework for the Physical Economy | *Global X ETFs*
Discover the HALO framework as a practical lens for identifying durable opportunities and explaining real asset exposure to clients.

Count.ed
Tax & Strategy

Staying ahead of change. Technical updates, practical guidance, and insights that count.

Div 296 – It's Here! | *Accurium*
Understand the practical application of the new Division 296 rules, including in-scope members, actuarial requirements and earnings calculations.

—

Death and Taxes: Beyond the Final Return | *Knowledge Shop*
Examine the tax consequences of death, estate administration, CGT implications, superannuation death benefits and testamentary trusts.

—

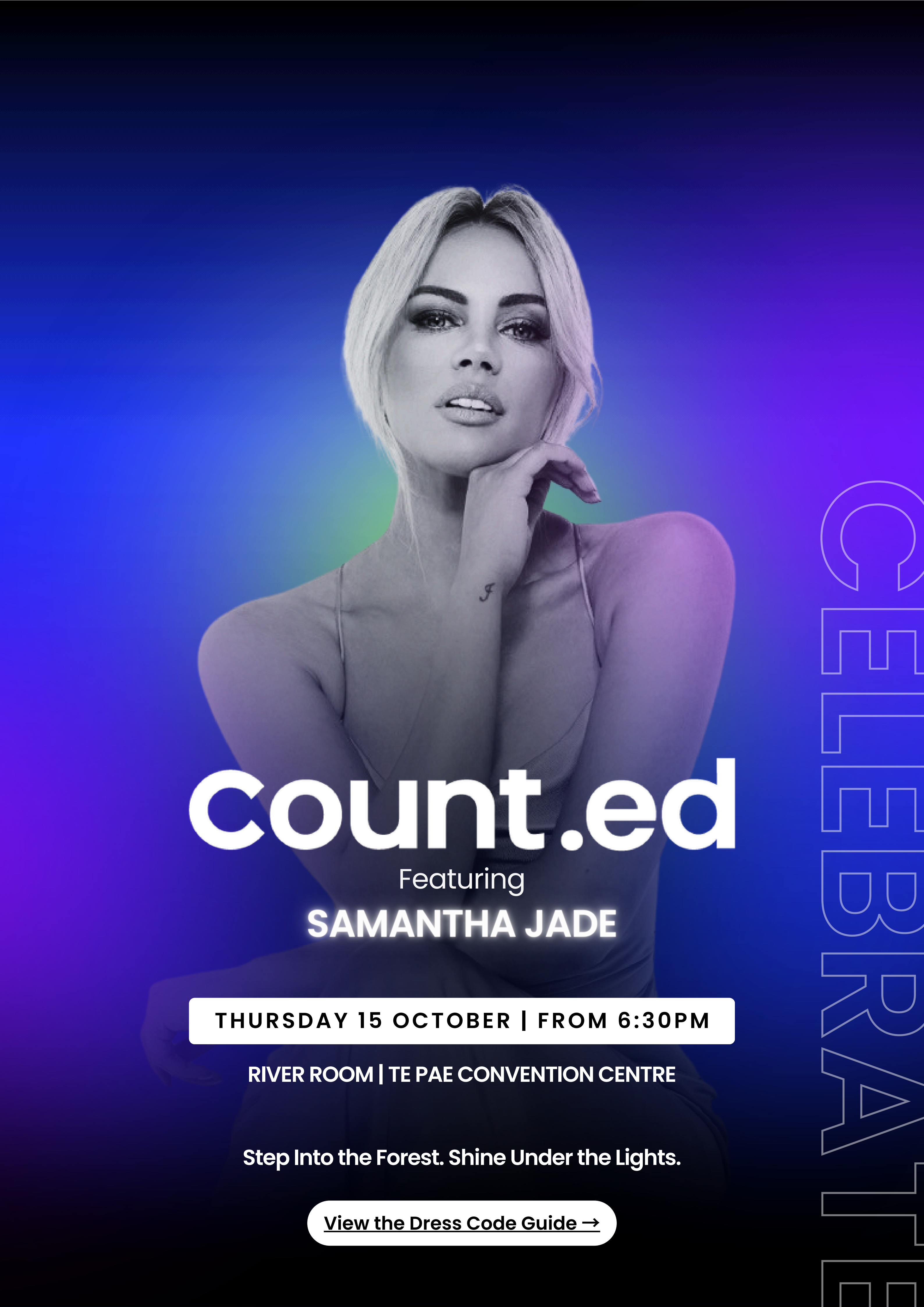
CGT Strategies Post Budget Changes | *TaxBanter*
Unpack the implications of recent CGT changes and identify planning opportunities before and after major transactions.

—

Rewriting the Rules: Negative Gearing in a Post Budget Landscape | *Knowledge Shop*
Explore the practical impact of new negative gearing rules and their implications for investors and advisers.

—

Trust Shake-Up: Making Sense of the Moving Pieces | *TaxBanter*
Review recent legislative and judicial developments affecting trusts and understand the actions advisers should consider.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RIVER ROOM | TE PAE CONVENTION CENTRE
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Day 5 - Departure

Friday 16 Oct