

Acorns of Australia 2019

Australia Emerging Manager Outreach

Thursday, 23rd May, Perpetual, 18th Floor, Angel Place, 123 Pitt Street, Sydney

AGENDA

TIME	SESSION
1:30 PM - 1:50 PM	REGISTRATION
1:50 PM - 2:00 PM	OPENING REMARKS Michael Gallagher, General Manager, AIMA Australia
2:00 PM - 2:45 PM	PANEL SESSION 1 - THE START-UP LEGAL TOOLBOX: TODAY'S TOOLS FOR TOMORROW'S SUCCESS <i>This panel will focus on the essential knowledge that aspiring managers/young start-ups will need during the initial stages of setting up a private fund. Topics covered will include a basic understanding of the regulatory requirements for a start-up as well as provide insights on various fund structures and jurisdictions.</i> Moderator: Alex Wise, Head of Australia & NZ, Castle Hall Alternatives Speakers: Nikki Bentley, Partner, Norton Rose Fulbright Antionette Elias, Partner, Financial Services, EY Paula McCabe, Legal Director, PMC legal
2:45 PM - 3:30 PM	PANEL SESSION 2 - ODDS AND SODS: THE ESSENTIAL OFFICE SET-UP CHECKLIST <i>Having a proper setup and infrastructure in place is essential for the efficient functioning of the office. Join us for this panel which will focus on various key aspects in running an investment firm including cybersecurity considerations, insurance plans as well as real estate costs when sourcing an office location.</i> Moderator: Nick Happel, CEO, Asia Pacific, Mainstream Fund Services Speakers: Sasha Krishna, Associate Director, Institutional Sales, Eze software Adam McCarthy, CEO, Paraflare Mel Decressac, Business Manager, Nanuk Asset management Les Andrews, COO, Aitken Investment Management
3:30 PM - 3:50 PM	COFFEE BREAK
3:50 PM - 4:35 PM	PANEL SESSION 3 - FUND RAISING: THE ART OF MARKETING AND COMMUNICATION <i>What do hedge funds need to be aware of when marketing and what are some of the common questions a potential investor will ask? These questions, and more will be covered in this panel session.</i> Moderator: Chris Spresser, Head of PB Australia, Morgan Stanley Speakers: Jeb Altonaga, COO, Head of Marketing, Sandon Capital Meg Jenner, Director, Distribution, Pinnacle Investment Management Melissa Ridley, Investor Relations, Marketing Manager, Ellerston Capital Hugo Agudo, Senior Research Analyst, Perpetual Private

4.35 PM – 5.20 PM	PANEL SESSION 4 - MAKING YOUR SERVICE PROVIDER WORK FOR YOU <i>Outsourcing has been a much talked about topic in recent times. This panel will focus on the current environment for funds; the development of outsourced services for fund operations, how to get the best out of, and the procedures that should be put in place to monitor outsourced service providers.</i> Moderator: Speakers: Paul Mason, CFO, Montgomery Investment Management Tim Bolger , COO, Watermark Funds Management Luke Stevens, CFO, Caledonia Investments Glen Dogan, General Manager, Perpetual Corporate Trust
5:20 PM – 6:00 PM	MANAGER FIRESIDE CHAT - BRINGING THE BUSINESS TO LIFE <i>Join us for a chat with a manager(s) as they share insights and experiences on the challenges in building up a fund management business in Australia.</i> Speakers: Paul Chadwick, Managing Director, Nanuk Asset Management Michael Surridge, CEO, KIS Capital Partners
6:00 PM – 6:05 PM	CLOSING REMARKS Paul Chadwick, Managing Director, Nanuk Asset Management
6.05 PM – 8:00 PM	NETWORKING DRINKS

Please note that this event is conducted under the Chatham House Rule.

Special thanks to our kind host *Perpetual Corporate Trust* for hosting this inaugural *Acorns of Australia* Event this year.

For more information, please email mgallagher@aima.org