

# THE COMPLETE PACKAGE: Funds Management & Superannuation Funds

Wednesday 6<sup>th</sup> & Thursday 7<sup>th</sup> March 2002, Inter-Continental Hotel, Wellington

Conference: Funds Management  
Conference: Super Funds

N1074a  
N1074b

Please do not remove this label, even if incorrect – it contains your customer code.

## Personal Details:

1st Delegate: (Mr/Mrs/Ms).....

1st Name..... Surname.....

Job Title .....

2nd Delegate: (Mr/Mrs/Ms) .....

1st Name..... Surname.....

Job Title .....

Head of Department: (Mr/Mrs/Ms) .....

1st Name..... Surname.....

Job Title .....

Your Company Booking Contact: (Mr/Mrs/Ms) .....

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Nature of your company's business.....

## Please Register Me for the Following Event(s):

- |  |                     |
|--|---------------------|
| <input type="checkbox"/> The Funds Management 2002 Conference<br>Fee \$1195 +GST = \$1344.38 | (N1074a)            |
| <input type="checkbox"/> The Super Funds 2002 Conference<br>Fee \$1195 +GST = \$1344.38      | (N1074b)            |
| <input type="checkbox"/> Both One Day Conferences<br>Fee \$1695 +GST = \$1906.88             | (N1074a and N1074b) |

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Register a group  
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Sales Manager  
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## Payment Details:

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*Ensure the Conference Code, N1074 is written on the back of cheque*

☐ Credit Card. Please debit my:

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Card No: ..... Expiry Date.....

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*N.B. payment must be RECEIVED BEFORE the conference date in order to guarantee your place.*

## Conference Documentation

I am unable to attend the conference so please send me a copy of:

- ☐ the documentation for THE COMPLETE PACKAGE: Funds Management & Super Funds 2002 Conference  
☐ I enclose a cheque for \$395 + GST = \$444.38

## 5 Easy Ways to Register:



### By Post:

Complete and return  
the registration form  
together with  
payment to:  
IIR NZ Ltd  
Freepost 2690  
PO Box 3181  
Auckland 1015



### By Fax:

Complete and fax  
this registration  
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### By Phone:

(09) 379 5892  
Please remember to  
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N1074



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the information  
indicated on this  
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**Gain the very latest information  
on pertinent issues surrounding  
funds management and super  
funds ...**

- What strategies can you use to enhance your investments in volatile, international markets?
- Why are hedge funds experiencing an exponential rise in popularity?
- What direction will investment take on, should an even tax playing field come into play?
- What is the future of Master Trusts in NZ?
- What are the benefits of giving your members choice?
- How can Socially Responsible Investment work for you?

Hear from experts on how you should be approaching funds management and super both NOW and in the future ...

**Register Today! Call (09) 379 5892 or  
Post Your Registration to FREEPOST 2690,  
PO Box 3181, Auckland 1015  
or visit us at [www.iir.co.nz](http://www.iir.co.nz)**

## When & Where?

### Conference Dates:

– Funds Management: Wednesday 6<sup>th</sup> March 2002  
– Super Funds Thursday 7<sup>th</sup> March 2002

### Venue:

Inter-Continental Hotel,  
Wellington  
Cnr Featherston  
& Greys Streets  
Wellington  
Ph (04) 472 2722  
Fax (04) 472 4724

## Discounted Flights & Accommodation

IIR is delighted to be able to offer you discounted rates on both hotel accommodation and flights.



If you would like to book a discounted flight or hotel room then please call Corporate Traveller on 0800 150 180 stating that you are an IIR delegate.

## What Happens if I Have to Cancel?

You have several options:

1. Send a substitute in your place.
2. Confirm your cancellation in writing before 20<sup>th</sup> February 2002 and receive a full refund less a \$200 service charge. Regrettably no refunds will be made for cancellations received after this date. However, you will still receive the events documentation.

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# THE COMPLETE PACKAGE: Funds Management & Superannuation Funds 2002

Wednesday 6<sup>th</sup> & Thursday 7<sup>th</sup> March 2002, Inter-Continental Hotel, Wellington

Register yourself  
and a colleague from  
another company on both  
conference days and  
RECEIVE A  
**FREE CASE OF WINE!!!**

## Day 1 Highlights: FUNDS MANAGEMENT

### Including International Perspective from:

David Zobel

Director, Regional Head Asia Pacific, DB Absolute Strategies  
Deutsche Asset Management – Analysing Hedge Funds  
and Alternative Investment Structures

### Featured Speakers:

- Campbell Millar, Strategist, JBWere
- Mel Hewitson, Business Development Manager, Tower Asset Management
- Greg Haddon, Tax Partner, Deloitte Touche Tohmatsu
- Simon Botherway, CFA, Vice President, New Zealand Society of Investment Professionals

### Global Industry Performance Standards:

Louis Boulanger, CFA, President,  
New Zealand Society of Investment Professionals  
will examine

‘Globalisation and Enforcement of Standards to  
Allow Global Comparisons and Market Entry’

### Topics Include:

- Learn strategies to protect and enhance your investments six months after New York
- Gain key insights into selecting the best hedge funds for your portfolio
- The implications of having an even tax field come into play
- The future of SRI in New Zealand

Official Publication:

**financialalert**  
MAGAZINE

Endorsed by:

Financial  
Planners  
& Insurance  
Advisers  
ASSOCIATION  
INCORPORATED

## Day 2 Highlights: SUPER FUNDS

### The Power of Super: Who Will Wield it and How?

Participate in a panel discussion featuring finance  
spokespeople from NZ's political parties who will be  
cross examined by Superannuation experts!

### Featured Speakers:

- Michael Littlewood, Director, Planit Services Ltd
- Michael Chamberlain, MCA NZ Ltd
- Roger Kerr, Executive Director, New Zealand Business Roundtable
- Geoff Rashbrooke, Consulting Actuary

### International Speaker:

Andrew Wakeling, Consulting Actuary, Sydney  
will look at the ‘Fundamental Perils for Retirees  
Seeking to “go it alone” in Facing the Risks of  
Outliving their Savings’

### Topics Include:

- Master trusts and wrap accounts v stand alone schemes
- Using member choice to ensure customer satisfaction and buy in
- Hear the very latest in cutting edge techniques, technology, pitfalls and benefits of having Superannuation online
- Should New Zealanders be saving or investing for retirement?

Official Website:

**Good! = Returns**  
YOUR ONLINE MONEY MANAGEMENT MAGAZINE

Organised by:



The Institute for  
International Research  
– Where Knowledge  
and Experience Meet –

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# Looking into Funds Management and

## Funds Management

*Providing a Critical Analysis of the Latest Issues and Trends  
in the Financial Services Industry*

Wednesday 6<sup>th</sup> March 2002, Inter-Continental Hotel, Wellington

8.30 Registration and refreshments

9.00 Opening remarks from the Chair  
**Vance Arkinstall**, *Chief Executive, ISI*

9.10 **Globalisation and the New Zealand Funds  
Management Industry**

- Examining the NZ sharemarket & its possible future following demutualisation
- Is a merger with the Australian Stock Exchange likely and what are the potential effects on the NZ funds management industry?
- Discover just how strong the Tasman drift is: which fund managers are heading for Australia and why?
- Where does the future of NZ investment lie in NZ and overseas?

**Simon Botherway**, *CFA, Vice President, New Zealand Society of Investment Professionals*

10.00 **International Investment Trends & Managing  
Risk in Volatile Markets**

- What's at stake in the world markets five months after the American Terrorist Attacks?
- How terrorism has influenced world markets
- Looking for new opportunities
- Learning strategies to protect and enhance your investments

**Campbell Millar**, *Strategist, JBWere*

10.50 Morning tea

11.10 **Globalisation and Enforcement of Standards to  
Allow Global Comparisons and Market Entry**

- The driving forces behind adherence to the Global Investment Performance Standards (GIPS™)
- How will the AIMR® developed global standards affect the NZ funds management industry?
- Examining the New Zealand situation with respect to the adoption of GIPS™ as the local standard
- What does it take to implement such standards?
- Capturing the data, improving systems and obtaining industry-wide buy in

**Louis Boulanger**, *CFA, President, New Zealand Society of Investment Professionals, Pacific Basin Primary Representative on AIMR®'s Investment Performance Council*

12.00 **Analysing Hedge Funds and Alternative  
Investment Structures**

- Discover the basics of hedge funds and obtain insights into strategies available
- Gain key insights into selecting hedge funds for your portfolio

INTERNATIONAL  
SPEAKER

- How do the funds measure up in difficult market conditions and in a strong market? Comparing hedge funds with more conventional investments
  - A performance comparison of different hedge fund structures
  - International perspective on hedge fund investing
- David Zobel**, *Director, Regional Head Asia Pacific, DB Absolute Strategies, Deutsche Asset Management*

12.50 Lunch

1.50 **Socially Responsible Investment (SRI): A Major  
Future Player for the NZ Funds Management Industry**

- SRI is a huge growth industry overseas: How is the New Zealand market shaping up?
- Who is involved in SRI within NZ and how are they performing?
- Overseas legislation: How could this impact on New Zealand?
- How can consulting with your members on SRI improve your status and your membership?
- The future of SRI within New Zealand

**Mel Hewitson**, *Business Development Manager, Tower Asset Management*

2.40 **Hedge Funds: A Closer Look at What's Happening  
in New Zealand**

*"Last year Hedge Funds Industry Assets  
grew by more than 44% from 1998 to US \$450 billion"*  
*(US research company Cerulli Associates quoted in Good Returns)*

- Are hedge funds asset class or investment style?
- Are they a systemic advantage or just good luck?
- Are they sustainable or not?

**Richard Baker**, *GM, Investment Products, Tower Managed Funds*

3.30 Afternoon tea

3.50 **An Even Tax Playing Field? A Comprehensive  
Picture of Where Investment May be Headed  
Should an Even Tax Playing Field Come into Play**

- The predicted impact on domestic and overseas investment
- Learn which products are likely to rise to the occasion
- What are the key policy-maker's plans in the lead-up to this year's election?
- McLeod Tax Review

**Greg Haddon**, *Tax Partner, Deloitte Touche Tohmatsu*

4.40 **NZ Funds Management Practices: Healthy or Not?**

- Why is the securities commission report taking so long?
- The current state of the NZ funds management industry
- The implications for the future

**Philip Macalister**, *Editor, Good Returns*

5.10 Closing remarks from the Chair

5.25 End of conference

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# Superannuation Today and Tomorrow

## Super Funds

Re-positioning Superannuation to  
Improve Performance Results

Thursday 7<sup>th</sup> March 2002, Inter-Continental Hotel, Wellington

8.30 Registration and refreshments

9.00 Opening remarks from the Chair  
Anthony Davies, *Editor, FinancialALERT*

9.10 **The Power of Super: Who will Wield it and How?**

- Get a jump-start on the future of superannuation leading into the next election
- Finance spokesmen from the main political parties outline their super policies
- Who will benefit, by how much and where will the money come from?
- Your essential dilemmas listened to – your questions answered
- Cross examination by an expert panel
- Is consensus a lost cause? Let's find out!

*With Politicians and an*

Expert Panel of Cross-Examiners:

Roger Kerr, *Executive Director, New Zealand Business Roundtable*

Paul Fyfe, *Managing Director, Armstrong Jones*

Michael Littlewood, *Director, Planit Services Ltd*

10.50 Morning tea

11.10 **Would More Regulation Encourage Employer Sponsored Super Schemes?**

*Hear Geoff Rashbrooke promote the virtues of legislation with a rejoinder from Michael Littlewood*

- Examining the current environment
- Analysing the structural issues
- The implications and benefits of regulation
- Understanding the role of trustees
- Disclosure
- The future?

Geoff Rashbrooke, *Consulting Actuary*

12.00 **A Debate: Master Trusts and Wrap Accounts v Stand Alone Schemes**

*"93% of Australian and 55% of British employees are in an employee sponsored superannuation scheme, in NZ the figure is 17% and falling"*

*Financial Alert July 2001*

- The swing to master trusts: Taking a look at the facts and figures
- What do employers look for when making a choice between master trusts and superannuation schemes?
- The future of master trusts in New Zealand
- Hear from leading experts arguing the pros and cons on both sides of the table

James Thyne, GM, *Alliance Capital Management & Anthony Edmonds, Head of Client Servicing, AMP Henderson*

V

John Bayliss, *Actuary, Aon New Zealand*

Michael Chamberlain, *MCA NZ Ltd*

12.50 Lunch

1.50 **Using Member Choice to Ensure Customer Satisfaction and Buy in**

- Why should you give your members choice?
- Techniques for giving members choice
- Risks employers run when giving members choice: how can they be minimised?

Michael Chamberlain, *MCA NZ Ltd*

2.40 **Taking Investment Online**

- The proposition
- Scoping for success
- Technological considerations
- Product considerations
- Flexibility and future proofing

*Representative from AMP Henderson*

3.30 Afternoon tea

3.50 **Wealth Hazard: Not Dying To Plan**

*A look at the fundamental perils for retirees seeking to "go it alone" in facing the risks of outliving their savings. A hot topic in Australia but also a profound challenge for the financial services industry worldwide.*

- Longevity risks: The inadequacies of current products and advice
- Wastage: Gambling on your date of death and the savings that can't be spent
- Pooling: The scope to increase retirement incomes and reduce risk – new products and ideas
- The use and abuse of actuaries: What could be done and the questions they shouldn't be asked

Andrew Wakeling, *Consulting Actuary, Sydney*

4.40 **Does Saving Really Matter? Why is the Financial Services Industry so Worried About New Zealanders' "Poor Savings Habits"?**

- Savings and economic growth
- Savings and retirement income
- Savings and investment
- National interests and industry interests

Roger Kerr, *Executive Director, New Zealand Business Roundtable*

5.10 Closing remarks from the Chair

5.25 End of conference

*Due to unforeseen circumstances, the programme may change and IIR reserves the right to alter the venue and/or speakers.*

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