



INVESTMENT CONFERENCE 2001

The Evolution of Investment: Will the Reality Match the Promise?

Sheraton Auckland Hotel & Towers
Friday 16 March 2001

The Evolution Of Investment

It's global - It's dependent on intellectual capital - It's continually changing

As in the past, the Darwinian struggle of daily business will be won by those who adapt most successfully to the new trends which are unfolding. Success will go to the companies and industries that partner their way to a better future. Business must be predicated on constant change, not stability, organized around networks, not rigid hierarchies, built on shifting partnerships and alliances, not self-sufficiency, and constructed on technological advantages, rather than bricks and mortar.

These developments are as applicable to the Financial Services industry as they are to the companies in which we place our clients' funds. The IPAC Investment Conference 2001 provides informed perspectives on topical investment issues as well as addressing the impact of the evolution of investment on the provision, and providers, of Investment Management and Financial Planning services in New Zealand.

Conference Agenda

8.00am Registration

8.30am Conference Opening

Speaker: David van Schaardenburg, Director, IPAC

8.45am Non-traditional Investing

Investing in alternative strategies - what role do these investments have in a diversified portfolio?

Speakers:

David van Schaardenburg, IPAC

Paul Moore, P.M. Capital

Paul Dyer, AMP Henderson Global Investors

9.45am Morning Tea

- | | |
|--|---|
| <p>10.10am Workshop #1</p> <p>Ethical Investing</p> <p>Why investors are interested in social, environmental and financial performance. How ethical portfolios perform, and how they are screened.</p> <p><i>Speakers:</i>
 <i>Carlos Joly, Storebrand Investments</i>
 <i>Dr. Rodger Spiller, Money Matters</i></p> | <p>Workshop #2</p> <p>Evolution of Financial Planning</p> <p>Creating Business Value through Financial Planning Solutions</p> <p><i>Speakers:</i>
 <i>Richard James, NZ Funds Management</i>
 <i>(Additional Speaker to be advised)</i></p> |
| <p>11.15am Selecting Offshore Managers</p> <p>Selecting Offshore Managers – examining the logic and the process</p> <p><i>Speakers: Anthony Quirk, NZ Guardian Trust</i>
 <i>(Additional Speaker to be advised)</i></p> | |
| <p>12.30pm Luncheon</p> <p><i>Guest Speaker</i></p> | |
| <p>1.45pm Global Investing</p> <p>Investing around the world - by region, by investment style or by industry?</p> <p><i>Speakers: Scott Elliott, Wellington Management</i>
 <i>Craig Stobo, BT Funds Management</i></p> | |
| <p>3.00pm Workshop #3</p> <p>Currency Management</p> <p>Increased cross border investment equals rising currency risks – a perspective on extracting value in a volatile sector</p> <p><i>Speakers:</i>
 <i>Don Hellyer, Pareto Partners</i>
 <i>Adrian Orr, WestpacTrust</i></p> | <p>Workshop #4</p> <p>Consolidation of the Professionals</p> <p>Will the corporate model work for accountants, lawyers and financial planners?</p> <p><i>Speakers:</i>
 <i>Dr D J Maddern, Harts Australasia</i>
 <i>(Additional Speaker to be advised)</i></p> |
| <p>4.00pm Cocktail Hour</p> <p>Join us and fellow conference attendees for canapés and cocktails at the Sheraton.</p> | |