Register before the 30th July 2014 and Save $700 Early Bird Discount

International Business Review presents

ALT-INVEST 2014

Alternative Investments 2014 Conference

November 5th and 6th, 2014, Grace Hotel, Sydney

Investigating the rise and rise of non-traditional high yield and low risk investment products, strategies and allocation in an era of prolonged volatility and low growth

BE A SPONSOR AT THIS EVENTS

For Sponsorship Opportunities
sponsorship@ibrc.com.au

Jonathan Pain
Director, JP Consulting & Author of "The Pain Report"

Andrew Weisman
CIO, LiquidAlternatives Janus Capital

Tracey McNaughton
Head of Investment Strategy UBS Global Asset Management

Daniel Liptak
CEO, ZG Advisors

Gareth Abley
Head of Alternative Strategies, MLC

Andrew Vallner
MD, CPG Research and Advisory

Stephen Brown
Head of Infrastructure Australia, Whitehelm Capital

Jonathan Ramsay
Head of Strategic Research and Consulting Van Eyk

Kylie Willment
Senior Manager Investment Management NSW Treasury Corporation TCorp

Michael Dee
CEO, Harvesting Funds Management

Hugh Dougherty
Independent Consultant

John Corr
CIO, Aurora Funds

Ian Learmonth
Executive Director Social Ventures Australia (SVA)

Ray King
Partner, Mercer Investments

Steven Hall
CEO and Executive Director, Brookvine

Michelle East
Director, Certainty Compliance

Representative
AMP Capital

REGISTER REGISTER REGISTER REGISTER
2 & GET 2 FREE

REGISTER NOW:
PH: 02 9896 0776,
FAX: 02 9896 0796
register@ibrc.com.au,
www.ibrc.com.au

Researched & Developed by:

IBR Conferences

ALT-INVEST 2014

Alternative Investments 2014 Conference

November 5th & 6th, 2014, Grace Hotel, Sydney

EXHIBIT AT THIS EVENT

Conference Overview

In this world of prolonged volatility and low growth, it has never been a more opportune time for investment professionals to focus their attention on alternatives, as a viable and reliable asset class offering investors, low risk and high yields to offset underperforming traditional asset classes.

Through extensive research to undercover critical themes, IBR has gathered an expert line-up of local and international speakers, who, over two jam-packed days will provide unparalleled domestic and global insights into the full gamut of new generation and robust liquid and illiquid alternative products available, as well as winning short and long term strategies and actionable guidance on optimal portfolio implementation for wholesale, high net wealth and retail investors alike.

In a personable and relaxed setting,attendees from across the investment community will be exposed to broad yet highly relevant presentation content as well as open forum candid discussions where pressing questionswill be addressed and solutions found. Ample time will also be dedicated to fostering networking opportunities and re-establishing industry contacts in this dynamic, varied and complex area of finance.

Book today to reserve your place at this timely and 'must attend' event for 2014.

Wide ranging and highly pertinent subject matter includes:

- Global Economic Trends and Future Outlook
- Asset Allocation portfolio strategies
- Institutional Investors perspectives on alternative investment
- A retail perspective in allocating to alternatives
- Partnership alignment and manager selection
- Regulatory, compliance and reporting requirements
- Hedge fund investment options and opportunities
- Investment timing indexes
- Alternative fixed interest as a "better source of risk premium"
- Strategic allocation of commodities
- Infrastructure asset portfolio design and global opportunity
- The rise and rise of Impact Investing
- Understanding the True Scope of Private Equity Investing
- Tapping into the world ofNiche Alternatives

Who you will meet :

CEOs, CIOs, Institutional investors, Super funds, multi asset and specialist fund managers and advisors, hedge funds, PE firms, family offices, charities, endowment and foundation organisations, investment banks, regulators, university department heads, analysts, economists, strategists and asset allocators, media commentators, as well as other key industry stakeholders

ALT-INVEST 2014

Alternative Investments 2014 Conference

November 5th & 6th, 2014, Grace Hotel, Sydney

EXHIBIT AT THIS EVENT

Day One – Wednesday, November 5, 2014

8.00 Registration and Networking

9.00 Opening remarks from the Chair

GLOBAL TRENDS AND FUTURE OUTLOOK

9.10 THE NEW REALITY AND AN ALTERNATIVE APPROACH

Investors want actual returns rather than relative returns. When will the 'mainstream' investment community wake up to this reality? And why is such an approach called 'alternative'?

Jonathan Pain, author of The Pain Report, will discuss the forces that are likely to shape and define the global investment landscape in the years ahead. He will also discuss which investment approach makes both cents and sense!

Jonathan Pain, Director, JP Consulting & Author "'The Pain Report."

ASSET ALLOCATION PORTFOLIO STRATEGIES

9.55 "NEW WORLD ORDER: MULTI-ASSET INVESTING WITHOUT A BENCHMARK"

- Benchmark relative investing served investors well in the '90s
- But a new world order of higher volatility, lower liquidity, and greater focus on risk management requires new thinking and new tools
- New thinking: From Dynamic Asset Allocation to Dynamic Risk Allocation
- New tools: Asymmetric return profiles, downside risk management, VaR and stress testing of portfolios

Tracey McNaughton, Head of Investment Strategy, UBS Global Asset Management

10.40 REFRESHMENTS AND NETWORKING

11.10 HOW ALTERNATIVES ARE DRIVING TODAY'S NEW ASSET ALLOCATION MODELS

- Minimising downside risk
- Optimising Asset Correlation
- Adding alternatives as a complement to existing mainstream portfolios
- Choosing between liquid or illiquid asset investment
- Generating alpha through carefully selected alternatives
- Short and long term focus

Daniel Liptak, CEO, ZG Advisors (ZGA)

TRUSTEE PERSPECTIVES

11.55 INSTITUTIONAL INVESTORS PERSPECTIVES ON ALTERNATIVE INVESTMENT

PANEL DISCUSSION

- Where do alternatives fit in today's allocation mix?
- Using managed account platforms
- Keeping a close and transparent relationship with hedge funds
- Ensuring strict ethical and fiduciary obligations are met
- How many alternatives managers does it make sense to have as an institutional investor?
- What are realistic objectives for an alternatives portfolio? What role should it play in a broader diversified portfolio?
- How do you weigh up fees vs net returns in a world of MySuper driven fee disclosure?

Panelists: Gareth Abley, Head of Alternative Strategies, MLC, Representative, AMP Capital, Kylie Willment, Senior Manager , Investment Management, NSW Treasury Corporation, TCorp

12.40 LUNCH AND NETWORKING

1.40 ENDOWMENT FUNDS

RETAIL INVESTORS

2.25 ALLOCATING TO ALTERNATIVES: A RETAIL PERSPECTIVE

- The Australian superannuation industry is ultimately retail – what does the end-client want or need? Is there a conflict?
- Retail friendly alternatives strategies
- Implementation – single manager vs multi-manager products and platform availability
- Opportunities for product development

Jonathan Ramsay, Head of Strategic Research and Consulting, Van Eyk

3.10 REFRESHMENTS AND NETWORKING

PARTNERSHIP ALIGNMENT AND MANAGER SELECTION

3.40 LONG TERM INVESTING: RELATIONSHIPS, PARTNERSHIPS AND ALIGNMENT OF INTERESTS

In the past thirty years, asset management has evolved from a profession to a distribution-driven industry, and has shifted from a client-driven approach to a product-driven model. Where to from here?

4.25 SOURCING TALENT AND SELECTING MANAGERS WHO CAN CREATE AND GENERATE ALPHA

- Keeping client needs as a focus for now and in the future
- Guiding clients into alternatives investment
- Sourcing and nurturing talent

Hugh Dougherty, Independent Consultant

5.10 CLOSING REMARKS FROM THE CHAIR

5.20 END OF DAY ONE

5.30 NETWORKING DRINKS

Alternative Investments 2014 Conference

November 5th & 6th, 2014, Grace Hotel, Sydney

For Sponsorship Opportunities – sponsorship@ibrc.com.au

Day Two – Thursday, November 6, 2014

8.00 Registration and networking

9.00 Opening remarks from the chair

LIQUID ALTERNATIVES

9.10 HOW HEDGE FUNDS CAN DIVERSIFY CLIENT ASSETS, OFFER LOW VOLATILITY OPTIONS TO MAINSTREAM ASSETS AND IMPROVE RISK ADJUSTED RETURNS

PANEL DISCUSSION:

- What short term opportunities lay in derivatives and futures and falling markets
- Global macro strategies
- Risk arbitrage
- Potential for increased alpha
- Limiting downside risk with futures
- Achieving solid returns that do not correlate to major market indexes

Panelists:
John Corr, CIO, Aurora Funds, Andrew Weisman CIO, Liquid Alternatives, Janus Capital

9.55 NEW STRATEGIES IN STOCK MARKET INVESTING BY USING VOLATILITY

- The Pythagoras Investment Timing Indexes are based on a completely innovative mathematical understanding of the stock market, showing that events (which have share price effects) are predictable from changes in Volatility.
- Such changes in volatility precede changes in the stock market. Harnessing this understanding is the most significant innovation in Finance in decades. Transactions can occur before any price event - proactively. Investing in a bull or bear market becomes less concerning as there are similar opportunities in each.
- When volatility is high, investors traditionally shy away from the market. But the level of volatility is irrelevant - it's what comes next that is critical. Pythagoras solves the question of "what comes next" - paramount to investment success!
- Practical examples will demonstrate the use and effect of the Timing Indexes.

Michael Dee, CEO, Harvesting Funds Management

10.40 REFRESHMENTS AND NETWORKING

11.10 DEVELOPMENTS IN ALTERNATIVE FIXED INTEREST

As with the equity-based "Alternative" classes (PEq, long-biased Equity Long-Short), investors should accept and embrace the correlation of Alternative FI and treat it as a better source of risk premium than a true "diversifier". Portfolio construction should address the expected beta rather than take an allocation inappropriately from either extreme
Quite aggressive targets have been consistent with low realised volatility in a post-GFC environment of wide spreads
Illiquidity premia represent a genuine "third dimension" alongside a traditional "risk-return" optimisation; constraining to liquid strategies is more restrictive and sub-optimal in Alternative FI than in some other Alternative investments
A test case shows the accessibility of aggressive / exotic strategies to even retail / HNW investors - alternative risk premia from fixed interest are not restricted to institutional investors.

Andrew Vallner, MD, CPG Research and Advisory

SUSTAINABLE AND SOCIALLY RESPONSIBLE INVESTING

11.55 THE RISE AND RISE OFIMPACT INVESTING

- What's happening around Australia and the globe
- Social Impact Bonds – what are they and should we invest in them?
- Impact Investing Funds – can we access them?

Ian Learmonth, Executive Director, Impact Investing, Social Ventures Australia (SVA)

12.40 LUNCH AND NETWORKING

ILLIQUID ALTERNATIVES

1.40 ACCESSING INFRASTRUCTURE: PORTFOLIO DESIGN AND GLOBAL INFRASTRUCTURE OPPORTUNITY SET

- Designing a portfolio of infrastructure assets
- Measuring risk, appropriate investment sizing
- Developing an investment plan
- The current infrastructure investment environment
- The current global opportunity set

Stephen Brown, Head of Infrastructure Australia, Whitehelm Capital

PRIVATE EQUITY

2.25 WHAT IS THE TRUE SCOPE OF PRIVATE EQUITY INVESTING?

- Understanding the different characteristics of the broader universe of private equity opportunities
- How can these be built into portfolios to meet alternative objectives
- What new directions are emerging

Ray King, Partner, Mercer Investments

3.10 REFRESHMENTS AND NETWORKING

NICHE ALTERNATIVES

3.40 TAPPING INTO THE WORLD OFNICHE AND NEWER ALTERNATIVES

Steven will talk about a newer group of niche investment opportunities that are less correlated to mainstream markets, more resilient in market down turns and have some strong underling driver of investment returns. He will highlight the role of these investments, make observations about their inclusion in a portfolio, introduce some newer investments and discuss the challenges faced when investing in these alternatives.

Steven Hall, CEO and Executive Director, Brookvine

REGULATORY SESSION

4.25 NAVIGATING THE REGULATORY CONTROLS, COMPLIANCE AND REPORTING REQUIREMENTS IN THE ALTERNATIVE INVESTMENT SPHERE

Including overview of the new financial requirements in ASIC Regulatory Guide 166 and 133

Michelle East, Director, Certainty Compliance

5.10 CLOSING REMARKS FROM THE CHAIR

5.20 END OF CONFERENCE

ALT-INVEST 2014

Alternative Investments 2014 Conference

November 5th & 6th, 2014, Grace Hotel, Sydney

For Sponsorship Opportunities –
sponsorship@ibrc.com.au

SPONSORSHIP OPPORTUNITIES

Alternative Investments Forum 2014 offers sponsors an excellent opportunity to demonstrate thought-leadership and leverage networking opportunities to build brand-value amongst senior professionals. If you would like to know more about sponsorship, exhibition and business development opportunities please just get in touch with us - sponsorship@ibrc.com.au

Other Events That May Interest You:

Sponsor/ Exhibit at our events: sponsorship@ibrc.com.au

ALT-INVEST 2014

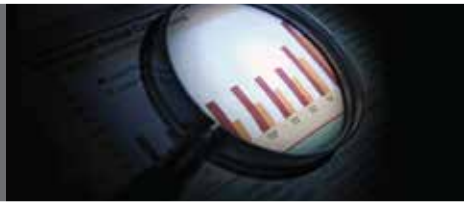
Alternative Investments 2014 Conference

5th-6th November 2014, Grace Hotel, Sydney

iPARM AUSTRALIA 2014

Investment Performance Measurement, Attribution & Risk Management 2014 Forum

15th-17th October 2014, Grace Hotel Sydney



POSTRET2014

POST-RETIREMENT 2014 FORUM

21st 22nd October 2014, Grace Hotel Sydney

LIFETIME ACCUMULATION STRATEGIES FOR SUPERANNUATION FUND 2014 FORUM

October 2014, Sydney

SFBO2015

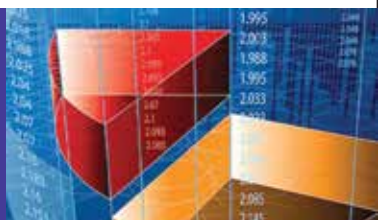
Superannuation Fund Back Office:

Member Administration and Investment Operations Services 2015 Forum

March 2015, Sydney

Asset Allocation 2014 Conference

2015, Grace Hotel, Sydney



ALT-INVEST 2014

Alternative Investments 2014 Conference

November 5th & 6th, 2014, Grace Hotel, Sydney

REGISTER EARLY & SAVE UP TO $700!	EARLY BIRD	SAVE	DISCOUNTED RATE	SAVE	NORMAL RATE
Please tick Conference Package	Pay before the 30th July 2014		Pay before the 30th Sept 2014		Pay after the 30th Sept 2014
☐ 2 day Conference only	$2495 + GST = $2744.50	$500	$2695 + GST = $2964.50	$300	$2995 + GST = $3294.50

**Only one discount applies per delegate and all the discounts are calculated from the normal rate.*

UNABLE TO ATTEND THE CONFERENCE

☐ Purchase the conference presentations $600 + 10% GST = $660

1st Delegate Name (Dr/Mr/Mrs/Ms) _____
Job Title: _____
Telephone: _____ Fax: _____
Email: _____
2nd Delegate Name (Dr/Mr/Mrs/Ms) _____
Job Title: _____
Telephone: _____ Fax: _____
Email: _____
3rd Delegate Name (Dr/Mr/Mrs/Ms) _____
Job Title: _____
Telephone: _____ Fax: _____
Email: _____
4th Delegate Name (Dr/Mr/Mrs/Ms) _____
Job Title: _____
Telephone: _____ Fax: _____
Email: _____
Company Name: _____
Address: _____
_____
Telephone: _____ Fax: _____
Approving Manager (Dr/Mr/Mrs/Ms) _____
Job Title: _____
Telephone: _____ Fax: _____
Booking Contact (Dr/Mr/Mrs/Ms) _____
Job Title: _____
Telephone: _____ Fax: _____
Email: _____

For additional delegates please photocopy this form.

EASY WAYS TO PAY

PLEASE CHARGE CREDIT CARD

☐ Bankcard ☐ Visa ☐ Mastercard ☐ Diners ☐ Amex

(3% Credit card fee willapply for Diners & Amex)

Credit Card Number

☐☐☐☐ ☐☐☐☐ ☐☐☐☐ ☐☐ ☐☐

Expiry date _ _ /_ _ Amex 4 digit code _ _ _ _ Amount $ _____

Name of card holder _____

PAY BY CHEQUE - CHEQUE ENCLOSED FOR $ ☐ (Cheques payable to IBR conferences)

PAY BY EFT - Remitting to IBR Conferences - BSB-082050 A/C No-87 367 0855 with National Australia Bank, 255 George Street, Sydney

Expected date of transfer..... EFT reference No.....

☐ I do not wish to receive any more mail from IBR conferences

GROUP DISCOUNT For 3 or more people, phone 02 9896 0776.
FOR CONFERENCE PAPERS: info@ibrc.com.au
CANCELLATION POLICY visit our web site or call **02 9896 0776.**
PRIVACY POLICY Visit our web site at **www.ibrc.com.au.**
INSURANCE: *Registration fees do not include personal, travel or medical insurance of any kind. Delegates are advised when registering for the workshop and booking travel that a travel insurance policy be taken out to cover loss, cancellation, medical cover, etc for any reason. IBR Conferences do not take any responsibility for any attendees failing to insure.*
DISCLAIMER: *IBR Conferences reserves the right to change the speakers, venue, dates or alter or delete items from the program as circumstances dictate and takes no responsibility for any errors, omissions and changes.*
ABN 72124362607

REGISTER NOW

POST:
Mail the form with payment to:
Registrations Manager
PO Box 411,
Wentworthville,NSW 2145

PHONE: (+61 2) 9896 0776
FAX: Complete and fax this registration form to: (+61 2) 9896 0796
EMAIL: register@ibrc.com.au
WEB: www.ibrc.com.au

VENUE DETAILS

Grace Hotel Sydney | 77 York Street | Sydney 2000 | Australia
PH: (02) 9272 6888

SPONSORSHIP OPPORTUNITIES
e-mail: sponsorship@ibrc.com.au