INVESTMENT DATA GOVERNANCE AND MANAGEMENT CONFERENCE
12th-13th June 2018 | Grace Hotel, Sydney

Attend Australia’s ONLY data governance conference focused on the financial services and asset management industry to gain invaluable insights into DG as a critical enabler to achieve enhanced efficiency, trustworthiness, compliance and business success in an increasingly data driven world.

Early confirmed speakers include:
- Cath Paki, Information & Data Governance Manager, Kiwibank
- Michelle Pinheiro, Head of Enterprise Data Governance, ANZ Bank
- Ben Watson, CEO, Maroon Analytics Australia
- Brett Elvish, Director, Financial Viewpoint
- Simon Cairns, Information & Data Governance Manager, Kiwibank
- Michelle Pinheiro, Head of Enterprise Data Governance, ANZ Bank
- Marko Milek, Managing Director and Head of Global Exchange for Asia Pacific, State Street
- Carl Bacon, CIPM Founder, Freedom Index Company, (UK)
- Susan Bennet, Principal, Sibenco Legal & Advisory & Co-founder and Director of Information Governance ANZ
- Sam Miller, Manager, Investment Data and Reporting, First State Super
- Carl Bacon, CIPM Founder, Freedom Index Company, (UK)
- Kylie-Frances Herbst, Director, Deloitte Consulting
- David D. Spaulding, DPS, CIPM, MD, The Spaulding Group (USA)
- Jason Warlond, Head of Business Development, APAC, Curium Data Systems
- Nigel Jansz, Director, Assurance and Advisory, Deloitte Touche Tohmatsu
- Brett Elvish, Director, Financial Viewpoint
- Hayley Zhu, Business Development Manager, Milestone Group

Research & Developed by:

International Business Review Presents:
DATA GOVERNANCE 2018

BRING YOUR TEAM AND SAVE 50% COST- REGISTER 2 & GET 2 FREE
Conference Overview

In this age of digitisation, 90% of the world’s data has been created in the last two years alone. With the proliferation of data expanding and becoming more complex and accessible, the need to control and monitor its capture, ensure its quality and integrity and how it is managed has become paramount and a top priority for responsible organisations, as part of their digital transformational journey.

In the financial services and asset management industry, Data Governance is emerging as a crucial enabler to success. Financial investment companies are recognising how data should be viewed as a strategic asset and how data governance is a critical activity to adopt, to ensure data is captured, stored and used responsibly to comply with govt regulations and codes of practice, and to engender stakeholder confidence, whilst opening up opportunities for innovation, competitiveness and improved productivity and business decision making.

This highly topical and content rich two day conference will highlight various aspects of data governance that organisations need to prioritise to operate successfully.

Sessions will range from regulatory updates, standards and new codes of practice, to case studies revealing successful strategy design and implementation, best practice insights and performance and value measurement.

Local and international experts drawn from finance sector, academia, government, consultancy companies and vendors will share their expertise and knowledge with specific Governance practices and activities as applied to data stewardship, privacy, security, data quality, big and master data, capture and storage, cleansing, analytics, reporting, Cloud migration and latest technological developments and future directions.

The holistic nature of how data governance can only work effectively if the people, various business units, processes methodologies and tools involved are aligned and working cohesively in an environment of accountability to meet business objectives, will also be addressed.

Attend 2018’s only Data governance event focusing on the financial industry in Australia to obtain invaluable insights and latest updates for stakeholders and immediately actionable information to help practitioners on their journey to implementing a new or improved data governance program. Book today to reserve your place.

Who should attend

Attendees will comprise, CDOs, CIOS, COOs, management from asset management firms, banks, insurance companies, superfunds, financial consultants, custodial banks, personnel in data stewardship, data management, analytics, data science, data reporting, capture, storage, regulation, compliance and risk management, as well as academics, govt regulators, standards agencies and vendors.

Sponsorship Opportunities

Investment Data Governance and Management Conference 2018 offers sponsors an excellent opportunity to demonstrate thought-leadership and leverage networking opportunities to build brand-value. 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

Endorsed By:

The Australian Information Industry Association (AIIA) is Australia’s peak representative body and advocacy group for those in the digital ecosystem. We are a not-for-profit organisation to benefit members, and AIIA membership fees are tax deductible. Since 1978 the AIIA has pursued activities to stimulate and grow the digital ecosystem, to create a favourable business environment for our members and to contribute to Australia’s economic prosperity.

We do this by delivering outstanding member value by providing a strong voice of influence, building a sense of community through events and education, enabling a network for collaboration and inspiration, and developing compelling content and relevant and interesting information.
**8.00** Registration and Networking

**9.00** Opening remarks from the Chair  
*Ben Watson, CEO, Maroon Analytics Australia*

**LIVE CONNECT PRESENTATION**

**9.10** DATA REQUIREMENTS FOR PERFORMANCE & RISK MEASUREMENT  
*Only the basics are needed*  
*But, accuracy is tantamount*  
*And, there are often misunderstood aspects from a transactional perspective*

*David D. Spaulding, DPS, CIPM, MD, The Spaulding Group (USA)*

**9.50** HITCHHIKER’S GUIDE TO INVESTMENT DATA MANAGEMENT  
The journey of a data management project is full of cross roads, diversions and even scenic routes.

*Christian Eriksen, Co-Founder and Director, Investment Control Systems*

**10.30** Refreshments and networking

**11.00** EDW IMPLEMENTATION FOR INVESTMENT MANAGEMENT DATA  
*Market Analysis*  
*General Proposed Timeline*  
*Our Approach*  
*Case Studies*

*Nigel Jansz, Director, Assurance and Advisory, Deloitte Touche Tohmatsu*

**11.40** OUTSOURCING VERSUS INSOURCING INVESTMENT MANAGEMENT AND IMPACT ON DATA OWNERSHIP AND GOVERNANCE RESPONSIBILITY

**Panelists**  
*Hayley Zhu, Business Development Manager, Milestone Group*  
*Jason Warlond, Head of Business Development, APAC, Curium Data Systems*  
*Moderator*  
*Brett Elvish, Director, Financial Viewpoint*

**12.20** THE BUSINESS CHALLENGES THAT ARE SHAPING INNOVATION IN DATA MANAGEMENT

*The data management challenges themselves—ensuring data quality, consistency, availability and accessibility*  
*New technological developments*  
*New challenges that are really driving innovation and shaping technological advances in the world of data management.*  
*Business processes and technologies to put in place to satisfy regulatory obligations.*  
*Technology Disruption*

*Moderator*  
*Ben Watson, CEO, Maroon Analytics Australia*

**1.00** Lunch and networking

**2.00** BRACE FOR IMPACT: HOW THE NEW MANDATORY DATA BREACHES SCHEME AND THE EU GDPR WILL AFFECT YOUR BUSINESS

The new Notifiable Data Breaches Scheme and the EU General Data Protection Regulation require business to take a proactive approach to privacy and data protection or face potential substantial fines. Mandatory data breach notification, robust governance and accountability systems for information security, data privacy, prompt detection of data breach and reporting to regulators are now required. Businesses need to ask themselves:

- What is a notifiable data breach?
- Are you ready to comply with the Australian Information Commissioner’s assessment and notification process?
- Is your data breach response plan compliant?
- Do you understand why Privacy/Data Impact Assessments are now necessary?
- Does or could the new EU General Data Protection Regulation (GDPR) apply to your business?
- Governance and accountability key requirements of GDPR – what is needed?
- Bottom line benefits of robust Governance of Privacy and Data Protection

**Case Study**

**3.40** BUILDING A CULTURE THAT’S ONBOARD WITH DG AND ITS RAMIFICATIONS IN ORGANISATIONAL CHANGE AND HEIGHTENED ACCOUNTABILITY AWARENESS

*• Getting top down and bottom up approval*  
*• Moving away from siloed approach to problems to more collaborative*  
*• Establishing consistent rules, policies and procedures across departments and Business Units*  
*• Demonstrating value of the program*  
*• Implementing Incentive based reward system and leadership development program*

*Moderator*  
*Ben Watson, CEO, Maroon Analytics Australia*

**3.10** Refreshments and networking

**3.40** INTERACTIVE ROUNDTABLE DISCUSSION

**4.30** Closing remarks from the Chair

**4.40** Close of day one

**4.45** Networking drinks
Day Two 13th June 2018, Wednesday

8.00 Registration and Networking

9.00 Opening remarks from the Chair

Ben Watson, CEO, Maroon Analytics Australia

9.10 DISTRIBUTION OF PERFORMANCE & RISK ANALYTICS DATA

• GIPS 20:20 update
• Middle Office Stakeholders
• Today’s engagement process
• Self-service analytics
• What can asset managers learn from Netflix?

Carl Bacon, CIPM Founder, Freedom Index Company, (UK)

9.50 BIG DATA ANALYTICS FOR INVESTMENT MANAGEMENT

• What do we mean by big data
• Common problems with data management
• Combining investment and member data
• What can the custodian do for you
• How can we reach economy of scale

Marko Milek, Managing Director and head of Global Exchange for Asia Pacific, State Street

10.30 Refreshments and networking

11.00 HOW ASSET OWNERS AND SERVICE PROVIDERS CAN WORK TOGETHER MORE EFFECTIVELY TO BOOST DATA CAPABILITIES AND GOVERNANCE RESPONSIBILITIES

Panellists

Simon Cairns, Senior Specialist, Risk & Performance Analytics - Sunsuper
Marko Milek, Managing Director and head of Global Exchange for Asia Pacific, State Street
Sam Millar, Manager, Investment Data and Reporting, First State Super

Moderator

Brett Elvish, Director, Financial Viewpoint

11.40 BUILDING THE INVESTMENT CASE FOR DATA

• Dealing with size, complexity and change
• Define and clarify your value proposition for data
• Aligning expectation and outcome

Kylie-Frances Herbst, Director, Deloitte Consulting

12.20 Lunch and networking

1.30 CONNECTING THE DOTS – FROM DATA GOVERNANCE TO DATA MANAGEMENT

Identifying components of Data Management across Governance, Technology and Operations and considering how integrating them can lead to more successful outcomes

Jason Warlond, Head of Business Development, APAC, Curium Data Systems

2.10 INTEGRATING DATA GOVERNANCE AND DATA QUALITY INTO AGILE/LEAN PROJECTS

• Implementing data governance and data quality in small, valuable increments within existing projects.
• How a DG leader can add value to the agile process
• How to grow a data governance program using Scrum, delivering value and assuring alignment

Cath Paki, Information & Data Governance Manager, Kiwibank

2.50 Afternoon Tea

3.20 CURRENT INVESTMENT DATA MANAGEMENT & GOVERNANCE INDUSTRY PRACTICES - THE GOOD, BAD & UGLY

An interactive session starting by summarising conference highlights and providing delegates an opportunity to share their views on future developments and challenges and to forecast where the investment data world will be in a few years time. This will be a very interactive session. Delegates are encouraged to discuss specific questions which are not covered by speakers.

Moderator

Ben Watson, CEO, Maroon Analytics Australia

3.50 Closing remarks from the Chair

3.55 End of conference

Sponsorship Opportunities

Investment Data Governance And Management Conference 2018 offers sponsors an excellent opportunity to demonstrate thought-leadership and leverage networking opportunities to build brand-value.

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
INVESTMENT DATA GOVERNANCE AND MANAGEMENT CONFERENCE
12th-13th June 2018 | Grace Hotel, Sydney

REGISTER EARLY & SAVE UP TO $600!

<table>
<thead>
<tr>
<th></th>
<th>EARLY BIRD</th>
<th>SAVE</th>
<th>DISCOUNTED RATE</th>
<th>SAVE</th>
<th>NORMAL RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please tick Conference Package (Price per delegate)</td>
<td>Pay before the 30th Apr 2018</td>
<td>$600</td>
<td>Pay before 15th May 2018</td>
<td>$200</td>
<td>$2995 + GST = $3294.50</td>
</tr>
<tr>
<td>2 Day Conference</td>
<td>$2395 + GST = $2634.50</td>
<td></td>
<td>$2795 + GST = $3074.50</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

EASY WAYS TO PAY

**PLEASE CHARGE**

- Bankcard
- Visa
- Mastercard
- 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.


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 errors, omissions and changes.

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

REGISTRATION # 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

SPONSORSHIP OPPORTUNITIES

e-mail: sponsorship@ibrc.com.au

VENUE DETAILS

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

EASIER TO PAY EASIER TO SAVE UP TO $600!