

Global Investing

“strategic business innovation for sustainable growth”

Thursday 1 March 2012

Park Hyatt, Melbourne



Hosted by
 Jeremy Duffield
 Chairman

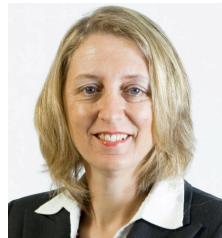
A AUSTRALIAN CENTRE
 FOR FINANCIAL STUDIES



Dr Julie Agnew
 Associate Professor of Finance
 and Economics
 The College of William and
 Mary, Williamsburg Virginia,
 USA and Senior Visiting Fellow
 Australian School of Business,
 University of New South Wales



Amy Auster
 Chief of Staff, CEO Global
 Institutional and Asia Pacific
 Europe & Americas
 ANZ Banking Group Limited



Joanna Davison
 Regional Managing Director,
 Australia and New Zealand
 Colonial First State Global
 Asset Management



Stephen Glenfield
 General Manager,
 South West Region
 APRA



Peter Kell
 Commissioner
 ASIC



Dr David Knox
 Senior Partner
 Mercer



Steve Lambert
 Executive General Manager
 Capital Markets
 National Australia Bank



Prof Deborah Ralston
 Executive Director
 Australian Centre for Financial
 Studies



Fiona Reynolds
 Chief Executive Officer
 Australian Institute of
 Superannuation Trustees



Ian Silk
 Chief Executive officer
 AustralianSuper



Dinner Speaker
 John Fraser
 Chief Executive Officer
 UBS Global Asset Management
 and Chairman VFMC

Recognising excellence and celebrating success across Melbourne's Funds Management and Superannuation Industry

The Melbourne Financial Services Symposium draws on leading industry experts, research, commentary and innovation to facilitate thought leadership exchange aimed at boosting the global credentials of Melbourne as an international centre for financial services and celebrates success in the form of the MFSS Awards.

The 2012 Melbourne Financial Services Symposium is proudly sponsored and supported by the following organisations:

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Attracts 4 PD
 points



Introduction

For over 14 years the Melbourne Financial Services Symposium (MFSS) has brought together industry leaders and experts across various fields to share their knowledge and global experience across the financial services industry, with each year focusing on issues affecting the markets we deal in and global impacts.

In 2012 the event will reflect on celebrating the successes around Melbourne, especially as a financial services centre. We celebrate not only the associated MFSS Awards recognising success and industry excellence; but also the size and vibrancy of Melbourne as the most liveable city in the world; and of Melbourne's collective industry communities and extensive networks. It is a celebration of success and a reflection of our leaders across industry, corporations, sport, culture and entertainment.

MFSS 2012 – “Global Investing – *strategic business innovation for sustainable growth*”

Creating and maintaining a “Centre of Excellence” in pensions and funds management, even in times of economic uncertainty, traditional and alternative investment opportunities flourish. With highly accessible global markets and Asia as a growth region, businesses need to continually endeavour to differentiate themselves through product innovation, development of core strategies and identification of niche markets.

Market growth has its challenges and can no longer be taken for granted, as investors look for long-term sustainable growth. Our speakers will provide insights into strategies for sustainable growth, improving competition and efficiencies through regulation, product innovation and look at emerging and “niche” markets to attract investment opportunities.

Keynote Speakers

The ACFS has secured well respected and renowned speakers:

1. Dr Julie Agnew, Associate Professor of Finance and Economics, The College of William and Mary, Williamsburg Virginia, USA and Senior Visiting Fellow Australian School of Business, University New South Wales;
2. Amy Auster, Chief of Staff, CEO Global Institutional and Asia Pacific Europe & Americas, ANZ Banking Group Limited;
3. Joanna Davison, Regional Managing Director Australia and New Zealand, Colonial First State Global Asset Management (CFSGAM);
4. Jeremy Duffield, Chairman, Australian Centre for Financial Studies;
5. John Fraser, Chief Executive Officer, UBS Global Asset Management and Chairman of VFMC (*Dinner Speaker*);
6. Stephen Glenfield, General Manager (South West Region), APRA (Panel)
7. Peter Kell, Commissioner, ASIC;
8. Dr David Knox, Senior Partner, Mercer (Panel);
9. Steve Lambert, Executive General Manager, Capital Markets, National Australia Bank;
10. Prof Deborah Ralston, Executive Director, Australian Centre for Financial Studies;
11. Fiona Reynolds, Chief Executive Officer, Australian Institute of Superannuation Trustees (Panel); and
12. Ian Silk, Chief Executive Officer, AustralianSuper (Panel).

About the Host



The Australian Centre for Financial Studies (ACFS) proudly hosted the Melbourne Financial Services Symposium for the first time in 2010 and continues to provide avenues for industry recognition through the provision of Awards, knowledge transfer via keynote addresses and presentations and avenues for peer networking across the Symposium Program and Gala Dinner functions for the Funds Management industry.

The ACFS is a consortium partnership linking government, industry and academia and was launched in 2005 with seed funding from the Victorian Government. Consortium members are Melbourne, Monash and RMIT Universities and Finsia – the industry professional body. ACFS performs a pivotal role via its own research activities, through research grants, academic papers for ACFS conferences and publications, research reference groups and recently enhanced in-house contracted consulting research capability. It provides access to and links between academics, finance practitioners and government and draws on expertise and experience from across these groups, to facilitate knowledge creation and transfer throughout the greater finance community via its various activities.

The ACFS specialises in leading edge finance and investment research, aiming to boost the global credentials of Australia's finance industry, bridging the gap between research and industry, and supporting Australia as an international centre for finance practice, research and education.

Recognising Industry Excellence and Celebrating Success

The Melbourne Financial Services Symposium recognises success and industry excellence across the funds management industry through two prizes: the Investment Stewardship Award and the Victorian Innovation in Funds Management Award.

MFSS Investment Stewardship Award

The annual MFSS Investment Stewardship Award recognises long term responsible investment achievement. Applicants are assessed on their application of environmental, social governance factors, such as: investment performance, governance, risk management, investment philosophy, service quality, and product innovation.

Eligible applicants will be private sector investment managers (including industry and complying superannuation funds) with an FS licence and a minimum total of \$2b funds under management. Applicants must nominate a flagship product that demonstrates a performance track record of no less than 3 years, preferably 5 years. Awards are given for each Superannuation Fund and Investment Manager categories. A special commendation is given to the winner who excels in their implementation of the United Nations Principles for Responsible Investment.

Awards are given for each Superannuation Fund and Investment Manager categories. A special commendation is given to the winner who excels in their implementation of the United Nations Principles for Responsible Investment. Last year's winners were Cbus, Aviva Investors and UCA Investment Management. VFMC proudly sponsors the Award. **Previous Award winners include:** Aviva Investors, Cbus, BlackRock; Lend Lease Investment Management; Telstra Super, UCA Investment Management and UniSuper. **Register your interest – joyce.teo@australiancentre.com.au**

Victorian Innovation in Funds Management Award

The Victorian Innovation in Funds Management Award recognises a Victorian fund manager that has established successful business operations in Victoria and can demonstrate innovation in their investment strategies and business operations.

Eligible applicants need to show that they were established in Victoria; are predominantly owned and managed by the management team and can demonstrate a three year investment track record. Specialisations can range from and are not limited to: Australian equities, fixed income, property, alternative assets, Asia Pacific hedge and investment products, small and micro cap equities, private clients and charitable funds management and venture capital, and PDF funds management organisations. In its third year the Award has become a mark of achievement for Victorian fund managers. This Award will provide an opportunity for the successful fund manager to be showcased and publicised in the financial media as an exemplar in innovative funds management. **Previous Award winners include:** Intrinsic Investment Management (2010), SG Hiscock and Company (2009) and Warakirri Asset Management (2008). **Register your interest – joyce.teo@australiancentre.com.au**

The Victorian Government proudly sponsors the Innovation Award.

Why attend?

- Participate in the celebration of Melbourne
- MFSS brings together industry leaders and experts to share knowledge and experiences
- This is the premier networking event for the Funds Management Industry in Melbourne
- It will enable participants to hear from key industry leaders, understand first hand initiatives being undertaken and challenges and opportunities in key markets; and
- Witness the presentation of the Victorian Innovation Award and the VFMC Investment Stewardship Award.

Who should attend?

This event provides an ideal opportunity for funds management industry professionals to network with peers across the industry and sharing in the celebration of Melbourne as a financial services centre.

This event would suit those working across the funds management and superannuation industry – academe, corporate and government.

Sponsors

Corporate sponsorship opportunities are available for the MFSS2012 program and gala dinner. For further details contact Frieda McLoughlin, Senior Manager Marketing, Events & Sponsorship (+61 3) 9666 1007.

CPD

Various professional and industry associations support the Melbourne Financial Services Symposium as meeting CPD obligations. Delegates should contact their professional affiliation to confirm CPD recognition. This event attracts 4 PD points.

SYMPOSIUM PROGRAM

Thursday 1 March 2012

12.45pm **ARRIVAL & REGISTRATION**



Fairmont, Lower Ground Floor, Park Hyatt, 1 Parliament Square, Melbourne

1pm **Welcome and Introduction**



JEREMY DUFFIELD, Chairman Australian Centre for Financial Studies

Retiring in December 2010 after a distinguished 30 year career with The Vanguard Group, including the last 15 as Chairman of Vanguard Investments Australia, Jeremy joins the Board of the Australian Centre for Financial Studies as Chairman. Jeremy brings to the role a strong, well respected and in depth knowledge of the financial services industry.

Mr Duffield is currently a director of Plum Financial Services, Ltd and a member of the Australia Financial Centre Task Force. He previously served on the Investment and Financial Services Association Limited (IFSA) as deputy chairman, on the Federal Government's Financial Sector Advisory Council (FSAC), and on the Advisory Board of the Financial Literacy Foundation.

1.05pm **Development of the Bond Market in Australia – a global perspective**



STEVE LAMBERT, Executive General Manager, Capital Markets, National Australia Bank

The pool of domestic funds available today is not deep enough to meet the combined funding requirements of the Big 4 banks and their clients. Market and regulatory pressures will also continue to drive up the cost and accessibility of bank debt. A strong corporate bond market in Australia will deliver alternative funding sources for corporate Australia away from traditional bank lending. At the same time, Retail Investors and the superannuation sector in general are interested in accessing new sources of annuity style, fixed income investments. However, unlike other countries, Australia's corporate bond market is small relative to our GDP and Institutional Bond activity.

Steve will draw on his deep knowledge of global capital markets to outline what a strong Australian corporate bond market could look like. He will also examine the key issues that issuers, investors, banks and regulators need to address to create a viable and attractive market.

Steve has had a career over 25 years in banking in a variety of roles in debt capital markets, interest rate, currency, commodity derivatives and structured products with emphasis on sales, originations and structuring. He has worked extensively outside Australia, mainly in the major Asian financial markets

JOANNA DAVISON, Regional Managing Director, Australia and New Zealand for Colonial First State Global Asset Management (CFGAM)

Joanna will focus on the global investment themes that are driving the growth in emerging economies. These will include the trend towards urbanisation, ageing demographics and heightened consumerism which is driving demand for food and resources. Increasingly developed listed companies are making a large proportion of their revenue from emerging economies. How do investors best tap into these global themes? Another increasing focus for investors is that the companies they invest in consider governance and more generally ESG issues. Joanna will provide some examples to illustrate these trends.

In her role, Joanna oversees the strategic direction of Australian and New Zealand business development, client services, responsible investment and sustainability, and the marketing and communication functions. Joanna is a member of the CFGAM executive team and reports directly to CEO Mark Lazberger

Joanna has more than 25 years experience in the funds management industry with varying roles both in Australia and the United Kingdom. Prior to joining CFGAM in 2009, Joanna was Director Investor Services at Russell Investment. In this role Joanna was responsible for the management of the Institutional Client Services team.

1.50pm **What are the global investment themes driving the growth in emerging economies?**



2.20pm **"Investing in Asia for the next supercycle"**



AMY AUSTER, Chief of Staff, CEO Global Institutional and Asia Pacific Europe & Americas, ANZ Banking Group Limited

The first decade of China's rise translated into an outperformance of Australia's share market, as China's emphasis on hard infrastructure investment spurred unprecedented demand for coal and iron ore. The next phase of Asia's supercycle will be characterised by increasing consumption and the rise of local players in an increasingly diverse market, against a backdrop of unprecedented change in financial services. What strategies, innovations and technologies are required to succeed?

Amy Auster is the Chief of Staff to the CEO, Global Institutional and Asia Pacific Europe and Americas at ANZ. Her team is responsible for the smooth running of the CEO's office and leadership team, as well as providing strategic advice to the CEO. Amy has held a number of thought leadership roles in the financial services industry in Australia, Asia and the US. She is currently a member of the Investment Advisory Committee at the Australian National University, a member of the Deakin Policy Forum Advisory Board and Vice Chairman of the Australia Indonesia Business Council (Victoria). Amy's recent written research has focused on the rise of China and its impact on Asia and Australia; the evolution of RMB liberalisation; and the impact of Basel III on the global financial services industry. Before joining ANZ in 2005, Amy worked as an economist and fixed income strategist with Chase Securities, Merrill Lynch and JP Morgan in New York. Amy has an Honours Degree in Arts from Northwestern University in Chicago, Illinois and a Master's Degree in Economics and Finance from Columbia University in New York.

Specialties - Macro-strategy, strategic asset allocation, fixed income markets, foreign exchange markets, natural resources, infrastructure, public policy.

3pm **REFRESHMENTS**

3.30pm **Behavioral Finance, Investor Knowledge and Communications**



DR JULIE AGNEW, Associate Professor of Finance and Economics, The College of William and Mary, Williamsburg Virginia, USA and Senior Visiting Fellow Australian School of Business University of New South Wales

This presentation will cover recent research from the U.S. related to participant investment behavior in defined contribution plans. The talk will highlight how asset allocation choices and other important financial decisions are influenced by information presentation, behavioral finance, and the participant's own financial literacy.

JULIE AGNEW is an Associate Professor of Finance and Economics and holds the John N. Dalton Term Chair at the College of William and Mary's Mason School of Business in the United States. She is currently a Senior Visiting Fellow at the Australian School of Business at the University of New South Wales. Her research and consulting activities focus on behavioral finance and its relationship to financial decisions made by individuals in their retirement plans. She has published research in top academic journals and frequently speaks at academic and practitioner conferences around the world. She has also served on special advisory panels to the U.S. government, as well as provided invited testimony to the U.S. Senate. In addition, she is a TIAA-CREF Institute Fellow, a former elected member of the Defined Contribution Plans Advisory Committee (DCPAC) for the Virginia Retirement System, and a Research Associate for the Center for Retirement Research at Boston College. From 2009-2011, she was the Co-Director of the Center for Interdisciplinary Behavioral Finance Research.

Prior to pursuing her doctorate, Dr. Agnew worked as an Analyst in investment banking for Salomon Brothers in New York City and as an Equity Research Associate for Vector Securities International in Chicago. A former Fulbright Scholar to Singapore, she co-authored a book examining strategic business opportunities in Indonesia, Singapore and Malaysia. Dr. Agnew earned a B.A. degree in Economics (High Honors) and a minor in Mathematics from the College of William and Mary. She graduated Magna Cum Laude and is a member of Phi Beta Kappa. She received a Ph.D. in Finance from Boston College in 2001.

4.10pm **"Learning lessons from the financial turbulence: ASIC's approach to the Financial Services industry"**

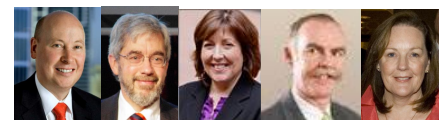


PETER KELL, Commissioner, ASIC

From August 2008 Mr Kell was Deputy Chair of the Australian Competition and Consumer Commission. He was President of the International Consumer Protection Enforcement Network in 2009-2010, and also served on the Consumer Policy Committee of the Organisation for Economic Cooperation and Development. Mr Kell has been on the Australian Government Financial Literacy Board since its establishment, and is a member of the Commonwealth Consumer Affairs Advisory Committee.

Before joining the ACCC, Mr Kell was Chief Executive of CHOICE (the Australian Consumers' Association) and a board member of the global consumer organisation Consumers International. Between 1998 and 2004 Mr Kell was ASIC's Executive Director of Consumer Protection and its New South Wales Regional Commissioner. Mr Kell has a Bachelor of Arts (Hons - Economics) from the University of Sydney.

4.50pm **Panel Discussion Australia's Super System – strengths and weaknesses**



Melbourne Mercer Global Pension Index – what are the consequences of the key differences between the Australian and other overseas systems and how can Australia improve its ranking?

Panelists include:

- Stephen Glenfield, General Manager (South West Region), APRA
- David Knox, Senior Partner, Mercer
- Fiona Reynolds, Chief Executive Officer, Australian Institute of Superannuation Trustees (AIST)
- Ian Silk, Chief Executive Officer, AustralianSuper

Moderated by Prof Deborah Ralston, Executive Director, Australian Centre for Financial Studies

5.30pm **SYMPOSIUM AFTERNOON CLOSE**


PROF DEBORAH RALSTON, Executive Director, Australian Centre for Financial Studies



6pm **COCKTAIL RECEPTION - ARRIVAL and REGISTRATION**

7pm **MFSS GALA DINNER** **Grand Ballroom**
Entrée - Smoked salmon, radish and snow pea salad with citrus mayonnaise (GF)

7.05pm **Master of Ceremonies** **MICHAEL POPE**



After almost 30 years in the television and corporate worlds, there isn't much Michael hasn't done. Whether it's warming up a mass of 30,000 for the televised Australia Day Awards, or MC'ing a black-tie dinner for a company's Award night. Michael has hosted six different television programs including BLOCKBUSTERS and TOTAL RECALL, IMT and BATTLE OF THE SEXES. As Producer, he oversaw THE PRICE IS RIGHT, BERT'S FAMILY FEUD and COMEDY SLAPDOWN. As audience warm-up he has been involved in every genre; THE LOGIES, THE AFI AWARDS, THE ARIAS, THIS IS YOUR LIFE, MILLIONAIRE HOTSEAT, TALKIN' 'BOUT YOUR GENERATION, DANCING WITH THE STARS, SO YOU THINK YOU CAN DANCE as well as sitcoms, sketch shows, game shows and variety dating back to 1990.

7.10pm **Welcome** **PROF DEBORAH RALSTON, Executive Director Australian Centre for Financial Studies**

7.15pm **Victorian Government Address** **Government Speaker TBA**

7.30pm **Celebration of Excellence – MFSS Award Presentations** *A celebration of excellence in Melbourne's Superannuation and Funds Management Industry – the Victorian Innovation in Funds Management Award and the VFMC Stewardship Award recognising exceptional standards in each category.*

8pm **Celebrating Melbourne** **BRETT BOWER – The Sand Artist**

Dinner

Alternating Mains
 Roast lamb, pine nut crumble, mint and pea puree with Dijon gnocchi
 Prosciutto wrapped barramundi, chorizo pecorino and bean cassoulet

Side Dishes
 Roasted potatoes with rosemary salt
 Broccolini with lemon emulsion and toasted almonds

8.30pm **Keynote address** **JOHN FRASER, Chief Executive Officer UBS Global Asset Management and Chairman of VFMC**



“Global investing – innovating for sustainable growth”

John Fraser has been Chairman and CEO of UBS Global Asset Management since December 2001. UBS Global Asset Management is one of the four business divisions of UBS – the others being Wealth Management & Swiss Bank, Wealth Management Americas and the Investment Bank. He is also a member of the UBS Group Executive Board and Chairman of UBS Saudi Arabia.

Prior to joining UBS and its predecessor organisations in 1993, John served for over 20 years with the Australian Treasury including appointment as Deputy Secretary (Economic) from 1990-1993 and postings at the International Monetary Fund (1978-80) and as Minister (Economic) at the Australian Embassy in Washington DC (1985-88).

9pm **Vote of thanks and closing remarks** **PROF DEBORAH RALSTON, Executive Director, Australian Centre for Financial Studies**

Dessert
 Toffee poached apple tart with leatherwood honey yoghurt

9.05pm **Networking** **Delegates are invited to remain and network with colleagues and peers.**

11pm **Symposium Dinner close**

About our Sponsors, Supporters and Event Partners:

Award Sponsors:



The Department of Innovation, Industry and Regional Development (DIIRD) is the Victorian Government's lead agency for economic and regional development, and is instrumental in building an innovative state. The formation of the department reflects the increasing emphasis the government places on innovation as a key driver of future economic success.

Government's goals for more quality jobs and thriving, innovative industries across Victoria will be fostered through DBI's five priority objectives: Investment Attraction, Trade Development, Developing Innovative Industries, Regional Development and Marketing Victoria.



VFMC was established under the Victorian Funds Management Act 1994 to provide investment and funds management services to Victorian public authorities. Our Minister is the Treasurer of Victoria, John Lenders MP. VFMC reports to the Minister through the Department of Treasury and Finance.

Tailored investment management services utilising a combination of in-house and external funds management expertise are offered by VFMC to each client. Specifically VFMC provides clients with:

- comprehensive investment risk management via optimal portfolio diversification and stringent process control
- a highly skilled investment team with depth in emergent asset classes
- strong economies of scale, delivering lower funds management, administration and custody costs
- access to markets through its substantial buying power .

Sponsors:



National Australia Bank Limited is an international financial services organisation.

One of Australia's biggest banks¹ and largest listed institutions², NAB manages relationships with retail, corporate and institutional clients, and financial organisations internationally.

A strong balance sheet contributes to maintaining an AA- credit rating and has seen NAB rank as the safest Australian bank and #12 overall in Global Finance Magazine's World's 50 Safest Banks³ listing.

NAB Group's operations in Asia, Australia, New Zealand, the United Kingdom and the United States serve over 11.5 million banking and wealth management clients, providing access to international financial markets and an extensive range of specialised funding, liquidity, investment, asset services and risk management capabilities.

Our first responsibility is to provide clients with safe and secure banking, delivering clear value and quality service.

Awarded 'Best Bank in Australia'⁴, strong international relationships combine with the local market knowledge of over 40,000 employees and a network of more than 1750 stores and Business Banking Centres to help us deliver efficient results worldwide.

At 30 September 2011, NAB had total assets of AUD753.7b, AUD112.7b in funds under management and administration, and reported an underlying profit of AUD9.6b⁵.

www.nab.com.au
www.wholesale.nabgroup.com
www.asset servicing.nabgroup.com

¹Ranked 20th globally industry ranking and 77th overall in the worlds Biggest Public Companies (Forbes May 2011)

²By market capitalisation (ASX) and total assets (Forbes May 2011)

³Comparison of long-term credit ratings and total assets of the 500 largest global banks (Global Finance Magazine 2011)

⁴Euro money Magazine 'Awards for Excellence' 2011

⁵NAB Full Year Results 2011

Northern Trust is a leading provider of investment management, asset servicing and custody services, fiduciary and banking solutions for corporations, institutions and state owned funds including central banks, sovereign wealth funds and state pension funds worldwide. Founded in 1889, Northern Trust has earned distinction as an industry leader in combining exceptional service and expertise with innovative products and technology.



As of December 31, 2011, Northern Trust Corporation had:

- \$100 billion in banking assets
- \$4.26 trillion in assets under custody
- \$663 billion in assets under management

This profile is provided for information only. For more details, visit www.northerntrust.com

Franklin Templeton Investments is a global investment manager. At the core of their business are multiple world-class investment management groups – Franklin, Templeton and Mutual Series – each operating independently and offering their distinct perspectives to financial advisors and their clients.

This multiple-manager structure allows them to offer exceptional, specialized expertise across key asset classes and investment styles, supported by a single global platform. Combined they offer investors the opportunity for true diversification, and as they say, "the expertise of many with the strength of one."

While each investment group adheres to its own time-tested investment philosophy, a common thread is their commitment to staying true to their time-tested disciplines, regardless of short-term market cycles.



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SYMPOSIUM INFORMATION

Symposium Sponsorship

Opportunities for organisations to become involved in future Symposiums exist, and the ACFS would welcome enquiries on the various packages available. First right of refusal exists for current sponsors.

Table Sponsor Packages

The Symposium is a major event in the funds management industry calendar and is host to two key industry awards where winners are announced during dinner. Industry professionals can lend their support to this event by sponsoring corporate tables (seating 10) to host High Net Worth clients and / or recognise and reward staff performance.

Terms and Conditions

Symposium changes

The MFSS team reserve the right to reschedule the Symposium, alter the program or presenters. Delegates and other participants will be notified via the MFSS website; however, the program is intended to run as advertised.

The advertised program is current at the time of printing. Changes will be reflected at the Symposium website.

Cancellation & Substitution

In the event a delegate is unable to attend, the registration may be transferred to another delegate. If a registration is cancelled on or before Monday 20th February 2012 payment will be refunded, less an administrative fee of \$66.00 (including gst). **No refunds will be provided for cancellations after Monday 20th February 2012.**

Corporate table sponsor bookings for the dinner that are cancelled on or before 20 February 2012 will be refunded less an administrative fee of \$275 (including gst). No corporate table sponsor refunds will be otherwise provided.

Privacy Policy

The MFSS team and ACFS require information to be provided to administer and manage registrations. This information will also be used for the purpose of providing you with information about future Symposiums.

How we use your personal information

Your personal information is collected so MFSS / ACFS can promote and market its products and services to you. We do this to keep you informed of our products, services, news and special offers. If you do not wish MFSS / ACFS to promote and market its products, services, news and special offers to you in relation to marketing and promotional material sent via email, we will send such material only if you elect to receive it (i.e. opt-in) or if it is provided in response to your request. You may opt out at any time from any promotional email issued to you.

Delegate Information

Symposium Dress Code

- Business attire is requested for all Symposium events.

Accommodation

- MFSS has negotiated a special Symposium rate for those delegates requiring accommodation at the Park Hyatt Melbourne. Please contact the ACFS on +61 3 9666 1050 for an Accommodation Form.

Registration

Please complete the registration form and fax it to (+61 3) 9666 1099 or scan and email it to events@australiancentre.com.au.

All Registrations will be acknowledged. Special dietary requirements are to be advised at time of registration to avoid disappointment.

REGISTRATION OPTIONS

Please note Full and Symposium registrations DO NOT include lunch.

SYMPOSIUM

REGISTRATIONS FROM 17 DECEMBER 2011

- | | Total
(gst included) |
|--|-------------------------|
| • Individual Full Symposium – (includes Afternoon Symposium and Gala Dinner) | \$ 650.00pp |
| • 3+ Full Symposium - tickets block booked from same organisation (includes Afternoon Symposium and Gala Dinner) | \$ 600.00pp |
| • MFSS Afternoon Symposium Program ONLY | \$ 440.00pp |
| • Full Time Academics (Symposium afternoon ONLY) | \$ 135.00pp |

GALA DINNER

- | | |
|---------------------------------|-------------|
| • Gala Dinner ONLY | \$ 250.00pp |
| • TABLE of 10 at Gala Dinner | \$2,500.00 |
| • TABLE of 10 - Award Finalists | \$2,250.00 |



Registration closing date – 5pm (AEDST) **Monday 20th February, 2012**

Further Information

Symposium Host – Australian Centre for Financial Studies (ACFS) www.australiancentre.com.au

Symposium sponsorship

- Frieda McLoughlin, Senior Manager Marketing, Events and Sponsorship (03) 9666 1007 or events@australiancentre.com.au

Registration form and tax invoice

Please complete sections 1 to 4

This registration form will be a tax invoice for GST when fully completed and when you make a payment. Please retain a copy for your records.

ABN: 12 377 614 012

Event – MELBOURNE FINANCIAL SERVICES SYMPOSIUM 2012
Event date
1ST MARCH 2012

How did you hear about this event?

 E-newsletter

 Email

 Website

 Employer

 Ad

 Other

1. REGISTRATION DETAILS

Mr/Mrs/Ms/Dr/Prof

First Name

Last Name

Company

Position

Address

Suburb

State

Postcode

T

F

E

Dietary requirements:

2. MULTIPLE REGISTRATIONS

- If you are registering other people, please provide their details below (mandatory) especially dietary requirements – PLEASE NOTE: Park Hyatt requires 7 working days notice prior to event date, to accommodate kosher requirements.

1	Name	Position
	Company	E
	T	Special diet requirements
2	Name	Position
	Company	E
	T	Special diet requirements
3	Name	Position
	Company	E
	T	Special diet requirements
4	Name	Position
	Company	E
	T	Special diet requirements
5	Name	Position
	Company	E
	T	Special diet requirements

For more than five registrations, please copy this page and supply relevant attendee details

3. PAYMENT – prices include GST (indicate number of registrations or tables required in relevant box) - DOES NOT INCLUDE LUNCH
Registrations AFTER 17 December 2011

<input type="checkbox"/>	FULL SYMPOSIUM	\$650pp	<input type="checkbox"/>	3+ FULL SYMPOSIUM	\$600pp	<input type="checkbox"/>	AFTERNOON SYMPOSIUM ONLY	\$440pp	<input type="checkbox"/>	GALA DINNER ONLY	\$250pp	<input type="checkbox"/>	GALA DINNER ONLY (Table of 10)	\$2,500
<input type="checkbox"/>	AWARD FINALISTS (Table of 10)		<input type="checkbox"/>	\$2,250		<input type="checkbox"/>	FULL TIME ACADEMIC AFTERNOON SYMPOSIUM ONLY		<input type="checkbox"/>	\$135.00pp		<input type="checkbox"/>	*TOTAL COST	
												<input type="checkbox"/>	\$	

Please select your preferred method of payment:

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 Cheque - *Please endorse to "MONASH UNIVERSITY"

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4. VERIFICATION SIGNATURE – please review and sign to complete your registration

I have read and understood the Australian Centre for Financial Studies' privacy policy, terms and conditions (below) and assume liability for payment of the above registration/s.

Signature

Name

Position

Please tick if you do not wish to receive information relating to the Australian Centre for Financial Studies activities across the financial industry.

PRIVACY: The Australian Centre for Financial Studies (ACFS) values your privacy and requires the information to administer and manage event registrations. Your personal information is collected so ACFS can inform you of our activities relevant within the financial services industry. If you do not wish ACFS to keep you informed, please opt out of any informational email you may receive in the future.

Please note that ACFS may provide your personal information on a strictly confidential basis to third party service providers and/or selected event partners/sponsors in order to conduct the event, unless you advise us otherwise by opting out by selecting this box.

TERMS AND CONDITIONS: ACFS reserves the right to alter this program or presenter(s) without further notice but aims to run as advertised or cancel this event due to insufficient support. Registrants will be notified should this occur and payment refunded in full. Registrants will be liable for payment in the event of non-attendance unless cancellation or request for transfer is made in writing and received by ACFS at least 5 working days prior to the event. Refunds will not be granted if a registrant fails to attend an event or cancels/transfers within 5 working days of the activity. Substitutions may be made at any time subject to the applicable registration rate where an additional payment may apply. **NOTE:** all prices are inclusive of GST *Please ensure all cheque payments are endorsed to "MONASH UNIVERSITY".