

# Agenda

**Tuesday, July 21**

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**8:30am - 9:00am**      **Registration and coffee**

**9:00am - 9:10am**      **Opening and welcome**



**Aleks Vickovich**

Editor-in-chief,  
Conexus Financial

CHAIR

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**9:10am - 9:55am**      **Keynote: Insurance, super and the Albanese Government**

An update on the Australian Government's financial services and superannuation policy agenda, including the role of group insurance arrangements as well as the Best Practice Principles for retirement and financial advice in super reforms.



**The Hon Dr  
Daniel Mulino  
MP**

Assistant Treasurer,  
Minister for Financial  
Services



**Aleks Vickovich**

Editor-in-chief,  
Conexus Financial

CHAIR

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**9:55am - 10:45am**      **CEO Panel: Leadership and sustainability of insurance in super**

Group insurance performs an important social function but the economics of the system are under stress. Greater scrutiny is being placed on the trade-offs between member cover quality and pricing — including return-on-capital requirements and breaking the pricing cycle.

This panel examines how industry leaders are thinking about sustainable profitability, member experience, harnessing technology and their key requests of government to foster more consumer-centric public policy architecture governing the sector.

It also examines how the provision of retirement solutions, especially longevity risk protection, acts as a natural hedge to providing death and TPD cover, and how insurers and funds can work more closely to bring these elements together, and how insurer and reinsurer balance sheets can be better leveraged to support funds' retirement income strategies.



**Meray El-Khoury**  
Chief insurance officer, MetLife Australia



**Fiona Macgregor**  
Group chief executive and managing director, TAL



**Dave Woodall**  
Chief executive, MLC Super



CHAIR

**Colin Tate AM**  
Founder and managing director, Conexus Financial

**10:45am - 11:15am Morning tea**

**11:15am - 11:45am Keynote: Member experience scorecard in superannuation**

Key findings from CoreData's research into the variability of the member experience in superannuation with a focus on insurance experiences — including the claims process — a range that continues to span the excellent to the abject.

This session explores what funds and insurers with outstanding member experiences are doing differently, and what is achievable without waiting for regulatory change. It will set the scene for the coming.



**Andrew Inwood**  
Global chief  
executive, CoreData  
Group



**Aleks Vickovich**  
Editor-in-chief,  
Conexus Financial  
**CHAIR**

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**11:45am - 12:35pm Workshop: Revolutionising disability insurance**

Changes to insurance and benefit design has undertaken a slow evolution over multiple cycles, when what may be required is more of a revolution in the way members' insurance needs are understood and supported. This interactive session will focus removing roadblocks to big, bold ideas and fundamental change and challenge delegates to put forward practical and implementable solutions that can be devised and executed by superannuation funds at senior levels, without government or regulatory intervention.

Insurers have a responsibility to ensure insurance offered to members is sustainable, but this session will look beyond pricing to optimal design and delivery mechanisms including:

- Program design and process innovations already available to funds and underwriters, but underutilised (the "first mover" problem)
- Addressing TPD shortcomings in relation to mental health and other claims, and the reforms needed to make the product fit for purpose – including "TPD by instalment" innovations
- Managing sustainability and cost of insurance inside super
- How funds can improve engagement with members leading up to the point of underwriting, at claims time and during the months and years following a claim
- The insurer-fund relationship, including data sharing, accountability and tender practices

**Includes table discussion**



**Damien Mu**  
Chief executive officer Australia & New Zealand, AIA; chair, Council of Australian Life Insurers



CHAIR

**Colin Tate AM**  
Founder and managing director, Conexus Financial

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**12:35pm - 1:35pm Lunch**

**1:35pm - 2:20pm In conversation: Mental health system redesign**

This session will provide an update on the latest medical and academic research relating to mental ill health, including how the system is evolving towards greater decentralisation and greater personalisation, and draw out the implications for underwriting insurance. It will focus on the underlying factors that have led to the rise in mental health claims, on research conducted in Victoria that drove significant change to the state's mental health and wellbeing system, and what insurers and super funds can learn from it.



**Graham Strong**  
Chief executive, Lifeline Australia



CHAIR

**Colin Tate AM**  
Founder and managing director, Conexus Financial

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**2:20pm - 3:05pm Panel: Moderating mental health claims**

Rising mental health claims and tightening workers' compensation settings are reshaping Australia's income protection landscape — shifting pressure into insurance held through superannuation and increasing complexity for funds, underwriters and members.

This panel explores what that shift means in practice, and how organisations can respond now through stronger governance, clearer accountability and practical operating model changes that improve outcomes without waiting for system-wide reform.



**Tristan Reis-Freeman**  
Chief strategy officer, Team Super



**Dan Walton**  
Group executive strategy and growth, EML



CHAIR

**Lachlan Maddock**  
Editor, Investment Magazine

**3:05pm - 3:35pm**

**Afternoon tea**

**3:35pm - 4:35pm**

**Workshop: Tech-driven reform, reinvention and innovation**

Technology — including artificial intelligence and adjacent tools — is having a measurable impact on how insurance in superannuation is underwritten and administered. But where exactly is the industry on the digital journey?

This session examines technology-driven process improvements and their impact on costs and claims handling, product design and underwriting innovation, and the practical limits of what can be automated without compromising the member experience.

**Includes table discussion**



**Craig Harrison**  
Director of insurance, Colonial First State



**Penny Pare**  
Senior manager, insurance, Australian Retirement Trust



**Darren Wickham**  
Head of group insurance, Zurich Financial Services



CHAIR

**Lachlan Maddock**  
Editor, Investment Magazine

**4:35pm - 5:30pm**

**In conversation: Reflections on tragedy, hope and purpose**

Following the tragic events at Bondi Beach this past summer, this final session will challenge and inspire delegates not just as key custodians of the insurance and superannuation sectors but as parents, human beings and or citizens.

Featuring the courageous Australian who led lobbying efforts to legislate gun reform in the wake of the Port Arthur massacre – at which he tragically lost his wife and two daughters – it will reflect on establishing resilience in the face of terrible adversity and how motivated individuals can affect meaningful social and political change.



**Walter Mikac  
AM**

Co-founder, The  
Alannah and  
Madeline Foundation



**Colin Tate AM**

Founder and  
managing director,  
Conexus Financial

CHAIR

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**5:30pm - 5:35pm**

**Closing remarks**



**Aleks Vickovich**

Editor-in-chief,  
Conexus Financial

CHAIR

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**5:35pm - 7:00pm**

**Post-summit drinks reception**