

# FIA INVESTMENT FORUM 2016

Conference for investment professionals

Venue: National Museum of Military History (War Museum), Johannesburg.

## AGENDA

Master of Ceremonies: Carel Nolte (CN & Co)

**08h00 - 09h00**

**Arrival, registration and visit sponsors' exhibitions.**

**09h00 - 09h30**

**Opening address on what the FIA is doing for it's members.**



**Seamus Casserly** FCII, FIISA, CIP, Management Diploma (INSEAD), Management Diploma (London School of Business), Technical Diploma (University of Texas)  
**FIA Board Member**

Seamus has been involved in the Insurance Industry since 1973 commencing his career at Price Forbes in Cape Town after University. He resigned from Alexander Forbes as Managing Director of the Short Term Businesses after 26 years and joined Nedbank in 1999 to develop and implement their Bank assurance strategy. He currently manages his own Independent Broking businesses which commenced as a green field start-ups in 2006. FirstEquity has developed into a full service operation with offices over Southern Africa headquartered in Bryanston.

His technical speciality is high risk industries mainly, Petro Chemical, and he has maintained a senior involvement in the industry. He is a past president and a current director of the FIA as well as a past chairman of the World Federation of Insurance Intermediaries which is a Global organisation based in Brussels championing the intermediary cause.

**09h30 - 10h10**

**Hedge Funds, the launch of local hedge Unit Trusts and what this means for financial planners.**



**Geoff Blount** BCom Hons (University of the Witwatersrand), CFA  
**BayHill Capital** Managing Director  
**Cannon Asset Management** Managing Director  
**Canon Private Clients** Head

After completing his degree, Geoff lectured Corporate Finance in Wits University's Business Economics department. He subsequently worked as an equity dealer and portfolio manager at Societe Generale Frankel Pollak (the precursor to Sasfin Securities). Geoff then moved to BoE Private Bank as a portfolio manager and, in 1999, joined the Investment Solutions investment team, where he developed and headed their manager research team. Over the next 10 years, Investment Solutions assets under management grew from R4bn to R180bn to become the largest multi-manager in South Africa.

In 2008 Geoff joined Cannon as Managing Director and in 2015, the private client business of Cannon was moved into a new FSP called BayHill Capital. Geoff is MD of both firms.

**10h10 - 10h50**

**The disconnect between asset management and financial planning.**



**Morne Rall** B Com Hons, CFP®  
**Grindrod Asset Management** Investment Consultant

Morne joined Grindrod Asset Management as an Investment Consultant in 2014. He has 16 years' experience in the investment industry. Prior to joining Grindrod, he worked for PSG Wealth as Head of Technical Sales and also for Investec as an Advisor Liaison Manager.

Morne's focus in the industry is Income Efficient Investing™, addressing clients' need for a reliable, growing income in retirement.

**10h50-11h15**

**Comfort Break, refreshments and visit sponsors' exhibitions.**

11h15 - 11h55

## Challenges facing the Investment Advisory Practice.



**George Dell** Certified: Financial Markets & Instruments

**Miton Optimal** Wholesale Marketing & Head Discretionary Fund Management Development Director

George started his career in the Financial Services Industry in 1984, in the investment department at Nedbank. He then moved to Old Mutual before becoming Regional Manager for mCubed Holdings.

Before joining MitonOptimal he was with a number of financial institutions, ultimately at PSG Group, initially in Sales & Business Development at PSG Fund Management and then as Head of Wholesale Marketing at PSG Asset Management.

George joined MitonOptimal in 2013, with a 32 year career in the Financial Services Industry gained from grass roots to senior levels and brings an in-depth understanding of the industry to seek, identify and develop business opportunities and solutions. George now focuses on the development of DFM business for the MitonOptimal Group locally.

11h55 - 12h35

## Key market conduct regulatory developments impacting investment advisers.



**Leanne Jackson**

**Financial Services Board**, Head: Market Conduct Strategy

Leanne joined the FSB in 2011, and is responsible for facilitating the FSB's new regulatory and supervisory frameworks in its transition to a dedicated market conduct regulator in a "Twin Peaks" regulatory model. This includes co-ordinating the implementation of the Treating Customers Fairly (TCF) consumer protection framework in the South African financial services industry.

Prior to joining the FSB, Leanne held the post of Executive: Legal & Regulatory Affairs for one of SA's large financial services groups. Leanne was extensively involved for many years in representing the financial services industry in engagements regarding many items of legislation and was also a member of the FAIS Advisory Committee since it was first established. Leanne has acted as member and Convenor of various committees of the former Life Offices Association and the Association for Savings and Investments in South Africa (ASISA).

12h35 - 13h30

## Buffet Lunch and visit sponsors' exhibitions.

13h30 - 14h10

## The Language of Investments of Stocks - Understanding Stocks & Equities.



**Peter Armitage** CA(SA)

**Anchor Capital** CEO

Peter is a CA(SA), having served articles with Deloitte & Touche. He has 23 years' experience in global financial markets, having worked as an analyst, Head of Research and Chief Investment Officer. Peter also ran an internet media business in 2000 and 2001. He achieved a record number of No. 1 positions (21) in the annual Financial Mail investment analyst survey of institutional investors. In 1999 Peter was rated the Top Analyst in SA by Finance Week. He has worked at Merrill Lynch, Deutsche Bank, Nedbank and Investec Wealth & Investment.

Peter is the CEO of JSE-listed Anchor Group, which he founded in 2011.

He was named by the Financial Mail as one of the 10 top businessmen in South Africa for 2015.

14h10 - 14h50

## A Political & Economic Overview - Why invest in South(ern) Africa?



**Dr Roelof Botha** M.Econ (*cum laude*) (University of Pretoria), Phd (University of Johannesburg)

The son of Pik Botha, Roelof received his early schooling in Stockholm (Sweden), Cologne (Germany), The Hague (The Netherlands), Christiana (North West), Cape Town and Pretoria.

He has followed a diversified career in management accounting, financial journalism, lecturing, consulting and economic research. He is a regular commentator & columnist on topical macroeconomic issues (in the national media) and has authored more than 500 articles, research papers & books.

In 2005, he received the prestigious *Finmedia Economist of the Year* award, based on the accuracy of forecasts of key economic indicators.

He has also been an economic advisor to PricewaterhouseCoopers for the past 26 years and teaches economics (part-time) at the Gordon Institute of Business Science (GIBS), University of Pretoria.

Over the past three decades, more than 400 companies & employer organisations have utilised his services in providing forecasts of economic indicators, mostly for purposes of strategic planning. His research is focussed on analysing sector-specific supply chains (including mining), macroeconomic impact assessments, the investment potential of the sub-Saharan African (SSA) region and the strategic importance of agriculture & mining.

14h50 - 15h00

## FIA Protea Branch Chairperson, Tony Jardim - Wrap up, summary.