

Tuesday, 3 October 2023 | Agenda

07:00	Arrival and registration.	
08:30	Welcome and introduction.	Macfarlane Moleli
08:40	Opening remarks by FIA.	Lizelle van der Merwe FIA
08:45	Imagine... A customer-centric world. <ul style="list-style-type: none"> Creating the best customer experience. Businesses that stand out, embrace customer experiences not just from a digital perspective, but also from a human perspective. AI digital assistants and the world of claims auto-approvals. 	Alex Terblanché Auto & General
09:10	The client journey through a glass prism: Enhancing engagement and fostering loyalty through personalised experiences. <ul style="list-style-type: none"> Integrating data into your practice. Optimising client value and portfolio outcomes. Retaining your customer. 	Hylton Kallner Discovery Bank
09:35	Are systemic risks insurable or not? <ul style="list-style-type: none"> How can a client work best with their broker and insurer to ensure they retain insurance cover? Systemic trends and hardening reinsurance rates. The important role of the brokers and advice in risk mitigation and risk transfer. The role of private and public partnership in building resilience. 	Lerato Matthews Santam
10:00	The power of perspective. <ul style="list-style-type: none"> Safety enhancement. Improved convenience. Environmental impact. 	Steven Lurie PG Glass
10:25	Comfort break.	
10:45	Welcome back.	Macfarlane Moleli
10:50	Using technology to help outcompete competitors. <ul style="list-style-type: none"> Understanding the critical role of technological adaptation for independent brokers. Addressing common challenges: cost, skill acquisition, and time constraints. Exploring insurer-provided technology solutions to empower brokers. 	Herman Scheepers RenaSA
11:15	Fintech innovations: The prism effect on financial services. <ul style="list-style-type: none"> Leveraging disruptive fintech for enhanced client experiences and business growth. 	Hymne Landman Momentum Investments
11:40	The age of data insights - using data to make better and more personal risk decisions.	Cliff de Wit Netstar
12:05	Lunch.	
12:50	Welcome back.	Macfarlane Moleli
12:55	Viewing the world through multiple facets: the transformative power of perspective. <ul style="list-style-type: none"> The necessity of interweaving multiple perspectives for better risk assessment and management. The unpredictability of catastrophic disasters. Multiple viewpoints to address diverse challenges. 	Mpumi Tyikwe Sasria

13:20	How can insurers and customers proactively respond to a new era of climate risks and realities?	Soul Abraham Old Mutual Insure
13:45	Embracing diversity: Navigating challenges and maximizing opportunities. <ul style="list-style-type: none"> Fostering an inclusive workplace that sparks innovation, creativity, and client engagement. 	Vic Saunders Momentum Insure
14:10	Perspectives on ESG investing. <ul style="list-style-type: none"> Aligning values and financial goals, integrating environmental, social, and governance factors into investment strategies. 	Johan Jordaan Spier Wine brought to you by Hollard
14:35	Comfort break .	
14:55	Welcome back.	Macfarlane Moleli
15:00	The power of storytelling: <ul style="list-style-type: none"> Communicating impact through multiple lenses. Crafting compelling narratives to communicate impact and connect with clients. 	Graham Easton Liberty
15:25	Topic to be revealed	Speaker To be revealed
15:50	Are financial advisor acquisitions gaining momentum in SA and following the international trend? <ul style="list-style-type: none"> Why is the industry so interested in acquiring financial advisory businesses? Should the industry be doing more to keep financial advisors independent? How do these developments potentially impact the insurance/investment industry? Is financial advisor "independence" overrated? 	Vaughan Jones Garrun Group George Dell MitonOptimal Leon Swart Origin Group Marc du Plooy Wealth Associates Moderator: Kevin Hinton The Collaborative Exchange
16:25	Closing comments.	Macfarlane Moleli
16:30	Networking.	

Sponsorship

fia ADVICE SUMMIT
2023

Level 1



Level 2

