

LEVERA CONNECTS 2026

PARTNER & STAFF CONFERENCE

CONFERENCE AGENDA

SUPPORTED BY:





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A MESSAGE FROM STEVE SLOANE



With Levera Connects 2026 coming up soon, I wanted to take a moment to say how much I'm looking forward to seeing you all in person.

This event has been designed with a clear purpose. It gives advice businesses the time and space to step away from the day to day, connect with their Levera team face to face, and work through how their business operates across both countries.

Across the three days, the sessions will focus on practical areas that directly impact advice firms. This includes improving onshore and offshore collaboration, building more efficient workflows, and using systems and technology, including AI, in ways that genuinely support advisers and staff. You will also hear perspectives on how advice businesses are evolving, how client expectations are changing, and what firms need to do to stay relevant in the years ahead.

One of the most valuable parts of this experience is the opportunity to meet your Levera team in person. When people understand each other's roles, strengths and working styles, everything becomes smoother. Communication improves, issues are resolved faster, and both onshore and offshore teams feel more connected to the same goals.

Outside the sessions, there will be time for relaxed conversations, good food and opportunities to experience local culture together. These moments often lead to the most meaningful discussions and the ideas that make the biggest difference when you return to your business.

We really value the partnerships we have with our clients and their teams, and I'm looking forward to spending this time together. Our focus is on making Levera Connects 2026 a meaningful, worthwhile and enjoyable experience for everyone involved.

See you very soon in the Philippines.

Steve Sloane



GUEST SPEAKERS



BAZ GARDNER

*Founder & Principal
The Social Adviser*



CHRISTOPHER MATHER

*Executive Director
Colonial First State*



JAMIE NEMTSAS

*Executive Chair
Brilliant Investment Group*



ADRIANNA BARLABAS

*Strategic Account Manager
Akumin Advisory*



TONY NASH

*Founder & Director
Booktopia*



CAMERON SPITTLE

*Managing Partner
Betashares*



KOHL GIANOLI

*Director
Insource Automation*



NICK HATZIS

*Investment Analyst
Atchison Consultants*



RACHANA SAN

*Practice Manager
Wattle Partners*



STEVE SLOANE

*Managing Director
Link Wealth & Levera Solutions*



JOSH LEE

*Director
Link Wealth & Levera Solutions*



KARIZ PAYUMO

*Operations Manager
Levera Solutions*

DAY 1 – CONNECTION, CONTEXT AND THE BIGGER PICTURE

THURSDAY, 12TH FEB, 2026

Start Time	End Time	Duration	Speaker/Host	Activity	Location
6:30 AM	7:30 AM	-	-	Breakfast	Holiday Inn Hotel
8:00 AM	-	-	-	Departure from Hotel to Resort	Bus
12:00 PM	12:30 PM	30 minutes	-	Guests arrive at La Jolla / Event registration / Bag drop	Lobby
12:30 PM	12:45 PM	15 minutes	La Jolla	Safety Session	Narra Hall
12:45 PM	1:30 PM	45 minutes	-	Lunch	Narra Hall
1:30 PM	2:00 PM	30 minutes	Steve Sloane, Josh Lee & Baz Gardner	Event Welcome	Narra Hall
2:00 PM	2:30 PM	30 minutes	Kariz Payumo & Steph Mendoza	Intro to Philippine culture / interactive activities / session	Narra Hall
2:30 PM	3:15 PM	45 minutes	Josh Lee (Host) & Tony Nash (Online)	Making the Invisible Visible (Online Session)	Narra Hall
3:15 PM	3:30 PM	15 minutes	-	Break	-
3:30 PM	4:15 PM	45 minutes	Baz Gardner	The future of practice growth in Australia - headwinds and opportunities	Narra Hall
4:15 PM	4:45 PM	30 minutes	Steve Sloane (Host), Josh Lee, Baz Gardner & Kohl	The future of automation and technology in advice businesses	Narra Hall
4:45 PM	5:00	15 Minutes	Josh Lee	Day 1 Close	Narra Hall
5:00 PM	6:30 PM	1.5 hours		Check into their rooms / Reminders for the overall programs	Narra Hall
6:30 PM	-	-	Steve Sloane & Josh	Dinner	Coco Grill

DAY 2- DEEP DIVE, CAPABILITY AND COMMUNITY

FRIDAY, 13TH FEB, 2026

Start Time	End Time	Duration	Speaker(s)	Activity	Location
6:30 AM	8:30 AM	-		Breakfast	Breakfast Area
8:30 AM	9:15 AM	45 minutes*	Baz Gardner	Day 2 - Welcome & Session (The future of practice growth in Australia - headwinds and opportunities)	Narra Hall
9:15 AM	10:00 AM	45 minutes	Martin Stone (Host), Josh Lee, Rachana San, Kariz Payumo	Unlocking the full value of offshore teams	Narra Hall
10:00 AM	10:45 AM	45 minutes	Christopher Mather	Practical applications of AI in advice businesses	Narra Hall
10:45 AM	11:00 AM	15 minutes		Break	
11:00 AM	11:45 AM	45 minutes	Cameron Spittle	Advice & Adviser Business Models (Online Session)	Narra Hall
11:45 AM	12:30 PM	45 minutes	Kohl Gianoli	Automation in advice, including a live demonstration...	Acacia Hall
12:30 PM	1:30 PM	1 hour		Lunch	Narra Hall
1:30 PM	2:00 PM	30 Minutes	Nick Hatzis	Scaling advice without stretching - The SMA operating model	Acacia Hall
2:00 PM	2:30 PM	30 Minutes	Stephen Sloane (host), Jamie Nemtsas, Adrianna Barlabas, Baz Gardner	The power of community in advice	Acacia Hall
2:30 PM	2:45 PM	15 minutes	Baz Gardner	Day 2 Session close & recap + invite clients to have a time with their assistants	Acacia Hall
2:45 PM	3:45 PM	1 hour	Martin Stone	Set time for Clients / Assistants	Acacia Hall
3:45 PM	6:30 PM	-		Free Time	
6:30 PM	-	-		Dinner - Beachside Dinner with Fire Dance Performance	Coco Grill

DAY 3 – VOICE, VISIBILITY AND CONNECTION

SATURDAY, 14TH FEB, 2026

Start Time	End Time	Duration	Speaker/Host	Activity	Location
6:30 AM	10:00 AM	3.5 hours	-	Breakfast and free time	Breakfast Area / Resort
10:00 AM	10:15 AM	15 Minutes	Baz Gardner	Day 3 - Welcome	Acacia Room
10:15 AM	11:00 AM	45 minutes	Christopher Mather	The Customer Voice & Using AI to scale communications	Acacia Room
11:00 AM	11:15 AM	15 minutes	-	Break	-
11:15 AM	12:00 PM	45 minutes	Josh Lee & Bohden Langdon	How advisers can build a voice on social media platforms	Acacia Room
12:00 PM	12:30 PM	30 Minutes	Baz Gardner	Conference Recap	Acacia Room
12:30 PM	1:30 PM	30 minutes	-	Lunch	Coco Grill
1:30 PM	2:30 PM	1 hour	Team Building Facilitator	2 Outdoor Activities with Staff	Outdoor
2:30 PM	5:30 PM	3 Hours	-	Networking/ water activities / free time	-
5:30 PM	6:30 PM	1 hour	-	Prepare for Dinner	-
6:30 PM	-	-	-	Levera Fiesta Dinner with Acoustic Band	Narra Hall

DAY 4 – CLOSE, REFLECTIONS AND DEPARTURES

Start Time	End Time	Duration	Speaker/Host	Activity	Location
7:00 AM	8:00 AM	1 hour	-	Breakfast	Breakfast Area
8:00 AM	9:00 AM	1 hour	-	Free time	-
9:00 AM	10:00 AM	1 hour	Steve/Josh	Conference Closing Remarks	Narra Hall
10:00 AM	11:30 AM	1.5 hours	-	Prepare for the departure and checkout	-
12:00 PM	-	-	-	Departure at the Resort	-