

# LEVERA CONNECTS 2026

PARTNER & STAFF CONFERENCE

## CONFERENCE AGENDA

SUPPORTED BY:

Colonial  
First State

IN The  
Inside  
Network

Atchison



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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    | Presenter/Host         | Session / Activity / Task   | Room/Area/Location |
|------------|----------|-------------|------------------------|---|--------------------|
| 6:30 AM    | 7:00 AM  | -           |                        | Call time at Metropolis Office  |                    |
| 7:00 AM    | -        | -           |                        | Departure   | Bus                |
| 10:00 AM   | 11:30 AM | -           |                        | Guests arrive at La Jolla / Event registration / Bag drop   | Narra Hall         |
| 11:30 AM   | 12:00 PM | -           |                        | Prepare to welcome Aus guests to resort, client FPA's up the front and give Sash to their clients | Front 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/Josh/Baz         | Event Welcome   | Narra Hall         |
| 2:00 PM    | 2:30 PM  | 30 minutes  | Kariz/Steph            | Intro to Philippine culture / interactive activities / session                                    | Narra Hall         |
| 2:30 PM    | 3:15 PM  | 45 minutes  | Josh (Host), Tony Nash | Making the Invisible Visible (Online Session)   | Narra Hall         |
| 2:30 PM    | 3:30 PM  | 15 minutes* |                        | Break   |                    |
| 3:30 PM    | 4:15 PM  | 45 minutes  | Baz                    | The future of practice growth in Australia - headwinds and opportunities                          | Narra Hall         |
| 4:15 PM    | 5:00 PM  | 45 minutes  | Steve/Josh/Baz /Jaime  | The future of automation and technology in advice businesses                                      | Narra Hall         |
| 5:00 PM    | 6:30 PM  | 2.5 hours*  | Committee              | Check into their rooms / Reminders for the overall programs / distribution of key cards           | Narra Hall         |
| 6:30 PM    | -        | -           | Steve/Josh             | Dinner  | Coco Grill         |

# DAY 2- DEEP DIVE, CAPABILITY AND COMMUNITY

FRIDAY, 13TH FEB, 2026

| Start Time | End Time | Duration   | Speaker/Host  | Session Description   | Location       |
|------------|----------|------------|---|---|----------------|
| 6:30 AM    | 8:30 AM  | -          |   | <b>Breakfast</b>  | Breakfast Area |
| 8:30 AM    | 9:15 AM  | 45 Minutes | <b>Baz Gardner</b>                                      | <b>Day 2 - Welcome &amp; Session (The future of practice growth in Australia - headwinds and opportunities)</b> | Narra Hall     |
| 9:15 AM    | 10:00 AM | 45 minutes | Martin Stone (Host) Josh Lee, Rachana San, Kariz Payumo | <b>Unlocking the full value of offshore teams</b>   | Narra Hall     |
| 10:00 AM   | 10:45 AM | 45 minutes | Christopher Mather                                      | <b>Practical applications of AI in advice businesses</b>  | Narra Hall     |
| 10:45 AM   | 11:00 AM | 15 minutes |   | <b>Morning Break</b>  | Narra Hall     |
| 11:00 AM   | 11:45 AM | 45 minutes | Cameron Splittle  | <b>Advice &amp; Adviser Business Models (Online Session)</b>  | Narra Hall     |
| 11:45 AM   | 12:30 PM | 45 minutes | <b>Baz Gardner</b>                                      | <b>The hard way is the easy way</b>   | Narra Hall     |
| 12:30 PM   | 1:30 PM  | 1 hour     |   | <b>Lunch</b>  | Narra Hall     |
| 1:30 PM    | 2:00 PM  | 30 Minutes | Kariz   | <b>Kariz Discussion - Levera History and Why's</b>  | Narra Hall     |
| 2:00 PM    | 2:45 PM  | 45 minutes | Jill/Ellay  | <b>HR Presentation - Building Stronger Relationships / getting to know each other</b>                           | Narra Hall     |
| 2:45 PM    | 3:00 PM  | 15 minutes | Jill/Ellay or Committee                                 | <b>Announce that staff with clients will move at the molave room to spend time with their clients</b>           | Narra Hall     |
| 3:00 PM    | 6:30 PM  | 3.5 Hours  |   | <b>Free Time</b>  |                |
| 6:30 PM    | -        | -          |   | <b>Dinner (Hawaiian theme)</b>  | Coco Grill     |

# DAY 3 – VOICE, VISIBILITY AND CONNECTION

SATURDAY, 14TH FEB, 2026

| Start Time | End Time | Duration   | Facilitator/<br>Owner           | Activity  | Location       |
|------------|----------|------------|---------------------------------|---|----------------|
| 6:30 AM    | 7:30 AM  | 1 hour     |                                 | <b>Breakfast</b>  | Breakfast Area |
| 8:00 AM    | 9:00 AM  | 1 hour     | Steve/Josh./<br>Chris/Martin    | <b>Levera -<br/>Business &amp;<br/>Operation<br/>Update</b> | Narra Hall     |
| 9:00 AM    | 1:00 PM  | 4 Hours    | Team<br>Building<br>Facilitator | <b>Amazing<br/>Race Staff<br/>only</b>                      | Outdoor        |
| 1:00 PM    | 1:30 PM  | 30 minutes |                                 | <b>Lunch</b>  | Coco Grill     |
| 1:30 PM    | 2:30 PM  | 1 hour     | Committee                       | <b>Outdoor<br/>Activities<br/>with Clients</b>              | Outdoor        |
| 2:30 PM    | 6:30 PM  | 4 hours    |                                 | <b>Free Time</b>  |                |
| 6:30 PM    | -        | -          |                                 | <b>Dinner<br/>Fiesta<br/>Theme</b>                          | Narra Hall     |

**DAY 4**  
**CLOSE, REFLECTIONS AND DEPARTURES**  
SUNDAY, 15 OF FEBRUARY 2026

| Start Time | End Time | Duration  | Facilitator/<br>Owner | Activity                   | Location       |
|------------|----------|-----------|-----------------------|----------------------------|----------------|
| 7:00 AM    | 8:00 AM  | 1 hour    |                       | Breakfast                  | Breakfast Area |
| 9:00 AM    | 10:00 AM | 1 hour    | Steve/Josh            | Conference Closing Remarks | Narra Hall     |
| 10:00 AM   | 11:30 AM | 1.5 hours |                       | Free time and check out    |                |
| 12:00 PM   | -        | -         |                       | Departure at the Resort    |                |