



## BEST OF BREED AUSTRALIAN RESEARCH TOUR

With heightened uncertainty and volatility, the need for senior industry participants to fully understand offshore investment capabilities has expanded beyond the standard pitchbook or industry presentation. To be candid: these are largely homogenous and provide little insight into how & when an investment manager will add value.

Following the success of previous **Best of Breed Research Tours**, we are doing it again – with this year’s event including complimentary registration to **Morningstar’s annual conference**. Due to logistical restrictions, this tour can accommodate a maximum of 8 delegates.

“The Heathcote Best of Breed Australian Tour is a Masterclass. Should you wish to experience what is truly an essential worthwhile investment in your business, to the foremost benefit of your clients’ interests and needs, then this is a must attend event....”

Alistair Bean  
Alistair Bean Financial Services

The **Best of Breed Research Tour** provides financial services professionals with an efficient opportunity to meet with a select group of investment managers in Australia. *Their* agendas are to provide you with a deeper and more technical insight into their investment process and philosophies, whilst conveying their outlooks and portfolio positions. We are also coordinating **at least one site inspection**, whereby the Manager can explain first-hand their rationale for investing / not investing into a stock. These presentations are technical in nature, referring to “live” models, and provide an opportunity to meet many of the team members who contribute towards the portfolio outcomes.

Each meeting will be held at the Fund Manager’s office, providing a unique insight for delegates to interact and gain a deeper understanding into the culture and people behind their investment processes, and philosophies.

We strongly encourage you to join us on this insightful research tour.

Clayton Coplestone  
Principal  
Heathcote Investment Partners



### WHEN & WHERE

MONDAY 30<sup>th</sup> MAY 2022  
FLY TO SYDNEY

TUESDAY 31<sup>st</sup> MAY 2022  
SYDNEY MEETINGS

WEDNESDAY 1<sup>st</sup> JUNE 2022  
SYDNEY MEETINGS

THURSDAY 2<sup>nd</sup> JUNE 2022  
MORNINGSTAR CONFERENCE  
FLY TO NEW ZEALAND

Delegates responsible for their own flights

### COST:

\$1,000 + GST per delegate  
Includes all meals, ground transport, accommodation, and registration to the Morningstar Conference  
Each delegate responsible for their own flights

“It was a real privilege to visit some of the fund managers and for them to honour us by getting really serious with the stuff that they showed us.”

Janet Natta  
Smart Money

### STRUCTURED HOURS OF LEARNING

All delegates will receive confirmation of at least 11\* hours Code Structured Hours of learning

\* This excludes CPD credits that are available from attending the Morningstar conference

### LIMITED SPACES

A full agenda with an invoice for \$1,000+GST will be sent shortly after your expression of interest has been received

Send to:  
Clayton@heathcoteinvestment.com

### THE SCHEDULE

#### Monday 30<sup>th</sup> May:

Due to limited flights, you are encouraged to fly a day prior

#### Tuesday 31<sup>st</sup> May:

9.00am: Manager meeting  
10.30am: Manager meeting  
12..00pm: Manager meeting includes lunch  
2.00pm: Manager meeting  
3.30pm Manager meeting  
5.00pm: Manager meeting includes site inspection & dinner

#### Wednesday 1<sup>st</sup> June:

9.00am: Manager meeting  
10.30am: Manager meeting  
12..00pm: Manager meeting includes lunch  
2.00pm: Manager meeting  
3.30pm Manager meeting  
5.00pm: Manager meeting includes dinner

#### Thursday 2<sup>nd</sup> June:

7.30am Delegate breakfast  
8.30am: Morningstar Conference

