

# OPEN INVITATION TO FINANCIAL ADVISERS



## MEET THE MANAGERS

Bringing Investment Professionals Together

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# Straight to the Point

It's been a big start to the year, with war, rising interest rates, inflation and the pandemic all contributing to uncertainty and volatility. With an extremely unpredictable future, we have asked our Presenters to get straight to the point: what is their outlook, and how are they positioned?

These punchy high quality live presentations are designed to provide delegates with all the details required to make informed decisions to aid with portfolio construction. There is nowhere else where you will get the opportunity to hear from and discuss investment markets with such a diverse line up of Presenters.

With so much content, we look forward to seeing you at one of the venues in May.

**Clayton Coplestone**  
Principal  
Heathcote Investment Partners



**Mike Ruetsch**  
Principal  
Heathcote Investment Partners



### THE SCHEDULE

Registration desk opens at 8am  
Roadshow starts at 8.30am  
Morning tea & lunch\* are complimentary  
The Roadshow ends at 4.30pm

\*Some venues will comprise a reduced program

### STRUCTURED CREDITS

Full attendance at the conference constitutes 6.5 hours of learning. If it is a learning aim within your 2022 Professional Development Plan, you may decide that this learning constitutes 6.5 Code Structured Hours.

## WHEN & WHERE

MONDAY 2<sup>nd</sup> MAY\*  
CROWNE HOTEL  
22a WAGHORNE STREET  
AHUIRI  
**NAPIER**

TUESDAY 3<sup>rd</sup> MAY  
INTERCONTENTAL HOTEL  
5 GREY STREET  
**WELLINGTON**

WEDNESDAY 4<sup>th</sup> MAY  
RYDGES HOTEL  
30 LATIMER SQUARE  
**CHRISTCHURCH**

THURSDAY 5<sup>th</sup> MAY  
MARITIME MUSEUM  
LEVEL 1  
CNR QUAY & HOBSON STREETS  
**AUCKLAND**

FRIDAY 6<sup>th</sup> MAY\*  
THE TAURANGA CLUB  
LEVEL 5  
DEVONPORT TOWERS  
72 DEVONPORT ROAD  
**TAURANGA**

COST: No charge

### RSVP

As there are genuine seat restrictions at all the venues, we encourage you to reserve your complimentary place now

Register at: [heathcoteinvestment.com/our-events/](https://heathcoteinvestment.com/our-events/)  
by Friday 22<sup>nd</sup> April 2022

For more information, please visit our website  
[www.heathcoteinvestment.com](https://www.heathcoteinvestment.com)



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**TOM KING**  
Chief Investment Officer  
NANUK ASSET MANAGEMENT



**JUSTIN TYLER**  
Portfolio Manager  
DAINTREE ASSET MANAGEMENT



**MATT REYNOLDS**  
Investment Director  
CAPITAL GROUP



**PETE MORRISSEY**  
Head of Real Estate Securities & Portfolio Manager  
APN REAL ESTATE SECURITIES



**IAN CARMICHAEL**  
Portfolio Manager  
FAIRLIGHT ASSET MANAGEMENT



**JAXON RUDDUCK**  
Head of Consultant Relations  
JANUS HENDERSON



**MATTHEW CLUNIES-ROSS**  
Chief Investment Officer  
ARTESIAN



**STEPHEN BENNIE**  
Portfolio Manager  
CASTLE POINT FUNDS MANAGEMENT



**JULIAN MORRISON**  
Investment Specialist  
ALLAN GRAY AUSTRALIA



**JONATHAN WU**  
Executive Director  
PREMIUM CHINA



**JUSTIN LANNEN**  
Portfolio Manager  
MAPLE-BROWN ABBOTT



**SASHI REDDY**  
Portfolio Manager  
STEWART INVESTORS



**STEVEN GLASS**  
Managing Director  
PELLA



**SEBASTIAN MULLINS**  
Deputy Head of Multi Asset  
SCHRODERS

WE LOOK FORWARD TO SEEING YOU AND YOUR COLLEAGUES

*This invitation is open to professional financial intermediaries only who are "wholesale clients" for the purposes of the Financial Advisers Act 2008 (as described in section 5c of the Act)*

We strongly encourage all investment professionals to attend these presentations to hear first-hand the outlook and views from some of the industry's leading investment management entities.

**RSVP NOW →**  
BY 22<sup>nd</sup> APRIL 2022



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