



MEET THE MANAGERS
Bringing Investment Professionals Together

Powered by



Portfolio Construction in the Age of Uncertainty

We've been taught that diversifying an investment portfolio with different asset classes helps to smooth out the return of the investments over time and reduces the dependency on the performance of a single asset class. But what do we do when bonds and equities fall at the same time?

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 September.

Clayton Coplestone
Principal
Heathcote Investment Partners



Mike Ruetsch
Principal
Heathcote Investment Partners



THE SCHEDULE (times may vary between venues)

Registration desk opens at 8am
Roadshow starts at 8.30am
Morning tea & lunch* are complimentary
The Roadshow ends at 2.30pm
*Some venues will comprise a reduced program

STRUCTURED CREDITS

Full attendance at the conference constitutes 4.5 hours of learning. If it is a learning aim within your 2022 Professional Development Plan, you may decide that this learning constitutes 4.5 Code Structured Hours.

WHEN & WHERE

MONDAY 12th SEPT*
CROWNE HOTEL
22a WAGHORNE STREET
AHUIRI
NAPIER

TUESDAY 13th SEPT
INTERCONTENTAL HOTEL
5 GREY STREET
WELLINGTON

WEDNESDAY 14th SEPT
RYDGES HOTEL
30 LATIMER SQUARE
CHRISTCHURCH

THURSDAY 15th SEPT
MARITIME MUSEUM
LEVEL 1
CNR QUAY & HOBSON STREETS
AUCKLAND

FRIDAY 16th SEPT*
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/
by Friday 2 Sept 2022

For more information, please visit our website
www.heathcoteinvestment.com



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Janus Henderson
INVESTORS

ANDREW KALEEL
Portfolio Manager
JANUS HENDERSON



Daintree
CAPITAL

BRAD DUNN
Senior Credit Analyst
DAINTREE ASSET
MANAGEMENT



CAPITAL
GROUP

MATT REYNOLDS
Investment Director
CAPITAL GROUP



APN | Real Estate Securities

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



Schroders

ANDREW FLEMING
Portfolio Manager
SCHRODERS



CASTLE POINT

STEPHEN BENNIE
Portfolio Manager
CASTLE POINT
FUNDS
MANAGEMENT



MAPLE-BROWN ABBOTT

STEVEN KEMPLER
Portfolio Manager
MAPLE-BROWN
ABBOTT



**DUNDAS
GLOBAL
INVESTORS**

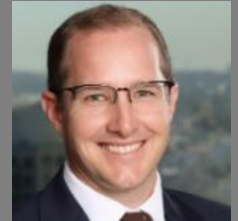
DAVID KEIR
Investment Analyst
DUNDAS GLOBAL
INVESTORS



FAIRLIGHT

IAN CARMICHAEL
Senior Portfolio
Manager
FAIRLIGHT ASSET
MANAGEMENT

THE RESEARCH PANEL



CHRIS DOUGLAS
Principal
MyFiduciary



NOAH SCHILTKNECHT
Consultant
Makao Investments



MICHAEL CHAMBERLAIN
Principal
MCA NZ Ltd



TIM MURPHY
Director of Manager
Research APAC
MORNINGSTAR

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 2nd SEPT 2022



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www.heathcoteinvestment.com