

**Future
IM/Pact**

 **Keystone**

Keystone

An 8-week program accelerating the growth of investment analysts by developing the non-technical components of conviction and humility

Virtual kick-off

Thursday 29 May 2025

Full day workshops and investor panels

Thursday 19 June 2025 and
Wednesday 16 July

Location

Mercer, 100 Barangaroo Ave,
Barangaroo, Sydney



Establish the foundations for an extraordinary career

Building a successful investments career involves more than honing technical skills. To be great, it's the non-technical skills like conviction, humility, and self-belief that must be mastered.

Keystone accelerates the growth of investment analysts by developing these critical non-technical traits. Over 8 weeks, you'll learn from leading investors and your peers, hear pinpointed feedback, and access powerful self-awareness and change tools to maximise your potential and shape your career trajectory. Here's how:

- ▶ **Define your investment identity:** Articulate your unique style, align with your strengths, and build lasting confidence. Holding this identity lightly is key.
- ▶ **Identify your growth edge:** Recognise and overcome the beliefs and habits that hold you back so you can manage these derailleurs and amplify your strengths.
- ▶ **Commit to change:** Rewire your mindset and deepen your emotional intelligence to embed new behaviours that propel professional growth.



“Star investors are made, not born. I didn't start with a passion for investing – I built it by finding purpose and embracing who I am. Those are the drivers behind my performance success, not technical skill.”

Amy Xie Patrick, Head of Income Strategies,
Pental Group

Generate profound insights to accelerate your performance and impact

Anchored to our inner game methodology and comprising leader insights, profiling, feedback, workshops and a peer network.

Prep - Thursday 29 May 2025

Virtual kick-off and prep-work.

Day 1 - Thursday 19 June 2025

- ▶ Investor panel
- ▶ Define your investment style and identity
- ▶ Identify your conviction, humility and self-belief growth goals

Action learning

- ▶ Feedback via online framework
- ▶ Manager meeting to discuss insights and challenges
- ▶ Peer-group pod catch ups

Day 2 – Wednesday 16 July

- ▶ Investor panel
- ▶ Pinpoint your greatest growth edge
- ▶ Map your personal change plan

Embed

Discuss and refine plan with manager, peers and other stakeholders.

Target outcomes



Learn from the the best

Hear from leading investors how they've developed their approach to building conviction and humility



Improve self-belief

Pinpoint your strengths and development areas, and build the habits that strengthen self-belief.



Be more impactful and effective

Hear the feedback and get the tools that will help you manage your ego and fears so you can do better work



Adaptability and career growth

Develop a growth plan that charts your path to greater conviction, humility and self-belief.



Supportive network

Do this powerful development with industry peers.

Design for

Investment analysts with 2 – 6+ years' investments experience across all asset classes and fund types.

Investment

\$2,100 plus GST for early bird registrations before 30 April

\$2,500 plus GST

10% discount for partners

Learn from leading investors in interactive panels

Investor panels kick-off two intense full-day workshops, allowing you to inform your self-reflection and development plan with insights and advice from industry leaders.



Amy Xie Patrick

Head of Income Strategies,
Pental Group



Dania Zinurova

Head of Infrastructure Funds & Fund Manager DDIT



Peter Steyn

Division Director,
Macquarie Group



Bruce Smith

Founder, Portfolio Manager,
Alphinity Investment Management



Ana Bessonova

Principal, QIC,
Global Infrastructure



Arms Rosenberg

Co-Founder,
Portfolio Manager,
Minotaur Capital

Watch this space! More panellists to be announced soon.

Visit future-impact.com.au/keystone for current schedule

Providing actionable feedback via a defined framework

Feedback provided by an online, qualitative survey inviting comments on strengths and development areas in each of the areas below.

Conviction

- ▶ **Data:** Incorporates relevant data and information from a wide range of sources
- ▶ **Analysis :** Conducts thorough, rigorous analysis and modelling
- ▶ **Insight:** Prepares clear and compelling insights and investment ideas
- ▶ **Communications:** Articulates recommendation / implications clearly and confidently
- ▶ **Viewpoint:** Is willing to take an informed view

Humility

- ▶ **Self awareness:** Plays to strengths and is aware of and is working on development areas
- ▶ **Feedback:** Asks for and positively responds to feedback from a wide range of stakeholders
- ▶ **Adaptability:** Alertness to signals or catalysts that may force a change in view, and acts accordingly
- ▶ **Emotional balance:** Is calm and composed under pressure
- ▶ **Limited self-orientation:** Prioritises needs of the team over own needs and goals

Self-belief

- ▶ **Openness to challenges:** Embraces new opportunities and challenges as a chance to learn and grow.
- ▶ **Resilience:** Bounces back from setbacks and failures
- ▶ **Positive body language:** Displays confident body language, such as maintaining eye contact, standing tall, and speaking clearly.
- ▶ **Initiative:** Proactive and takes initiative





What others say

All Future IM/Pact programs embed our inner game development methodology for transformational growth. Past program participants who lean into the experience have this to say.

“I was a little sceptical going into the program, but it has been way more impactful than I thought.

It might have taken me a few more years to make the learnings and have the realisations that I gained over the 4 months on this program.”

2024 LevelUP program participant, senior investment analyst

“I wish I learned this years ago. These insights are having a profound impact on how I get in my own way and what needs to change.”

Inner game coaching client - assistant portfolio manager

“Before I started Yolanda’s program, I was concerned how I’d make the time for it. Once I started, I knew this had to be my priority.”

Past program participant - then deputy head of asset class, now head.

For more information

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Register now

<https://future-impact.com.au/programs/individuals/keystone-analyst-program/>