

# Keystone

Helping you connect the dots between what you know and how you show up so you can add more value to your team.

	Sydney	Melbourne
Virtual kick-off	Thursday 29 May 10 – 11 am	Wednesday 3 September 10 – 11 am
Full day workshops and investor panels	Thursday 19 June Wednesday 16 July 9 – 5 pm	Tuesday 30 September Tuesday 28 October 9 – 5 pm
Location	Mercer, 100 Barangaroo Ave, Sydney	Mercer, Collins Square, 727 Collins Street Melbourne



# Want to be a great investor?

## That's an inside job.

Your training and experience have helped you master the fundamentals: financial modelling, valuations and market analysis, to name a few.

These technical skills are essential for a career in investing. But they're not enough to take you to the next level.

True career progression in investing comes from a different set of capabilities. They vary between private and public markets, and if you're an asset manager or owner (which doesn't fundraise), but there are common threads:

### Private markets

#### **Deal origination** –

Building your pipeline by developing relationships with founders, investors and others.

**Negotiation** – Creating and capturing value. Becoming the person founders and partners want at the table.

**Fundraising** – Earning trust and backing from LPs and stakeholders.

### Public markets

#### **Generating investment ideas** –

Finding value through deep analysis, quality conversations and sound judgement.

**Execution** – Buying and selling at the right time to generate returns.

**Fundraising** – Earning trust and backing from investors and their advisers.

These are your outer game, the visible performance that gets you promoted and paid, and builds your personal brand as an investor.

Yet here's the catch...

You can't play the outer game well without also working on your inner game. That means developing:

- ▶ **Conviction** – Clarity around your own values and investment thesis
- ▶ **Humility** – The mindset to listen and lead under uncertainty
- ▶ **Self-belief** – Confidence and trust in your abilities and potential

And that's the same across all asset classes and investment styles, and all organisation types.

Keystone will help you connect the dots between what you know and how you show up.

Between the investor you are and the investor you're becoming.

Because in this business, relationships matter and cannot be outsourced to AI.



“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

Virtual kick-off and prep-work.

### Day 1

- ▶ 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

- ▶ 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



**Improved career confidence and self-belief** by defining your purpose, passion and strengths



**Increase your impact and effectiveness** by identifying and addressing your derailers that are undermining the development of the core capabilities that will make you a great investor.



**Gain clarity on how you can adapt and grow** to better manage the balance of conviction and humility in service of generating winning ideas, doing deals and delivering performance.



**Develop a supportive network** by doing this powerful development with industry peers.

## Design for

Investment analysts with 2 – 8+ years' investments experience across all asset classes and fund types.

## Investment

**\$2,100 plus GST** for Melbourne early bird registrations before 30 June

**\$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



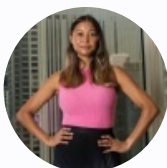
**Liza McDonald**

Head of Responsible Investment,  
Aware Super



**Ana Bessonova**

Principal, QIC, Global Infrastructure



**Arms Rosenberg**

Co-Founder, Portfolio Manager,  
Minotaur Capital



**Peiting Liang**

Analyst, Northcape Capital



**Paul Parsons**

Portfolio Manager / Analyst, Northcape Capital

“I’ve learned that conviction and humility require effort, just like self-belief does. These skills aren’t innate, but the rewards of working on them are transformational.”

Arms Rosenberg, Co-Founder, Portfolio Manager, Minotaur Capital

# Learn from leading investors in interactive panels



**Nick Griffin**

Founder and CIO,  
Munro Partners



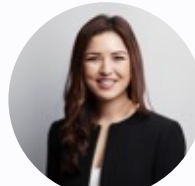
**Tracey Duff**

Head of Fixed  
Income, Rest



**Julia Bailey**

Head of  
Stewardship,  
Platinum Asset  
Management



**Jacinta Mills**

Associate Director,  
Real Estate Capital  
Markets, QIC



**Graeme Miller**

Partner, Chief  
Investment Officer,  
Mercer Super



**Olga Hogan**

Senior Director,  
Pre-Seed and  
University Innovation  
Program,  
Breakthrough Victoria



**Marina Pasika**

Head of Growth  
Alternatives, Rest



**Katie Hill**

Senior Fixed Income  
Strategist, QIC



**Shannon Reilly**

Principle, Head of  
Equities, Mercer  
Investment



**Paul Banks**

Head of Overlays and  
Treasury  
Management,  
Future Fund

“Humility is essential for creating the trust that builds the relationships that support the deal flow. You can’t negotiate without self-awareness and humility.”

Olga Hogan, Senior Director,  
Pre-Seed and University Innovation  
Program, Breakthrough Victoria

# 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

- ▶ **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
- ▶ **Resilience:** Bounces back from setbacks and failures
- ▶ **Limited self-orientation:** Prioritises needs of the team over own needs and goals
- ▶ **Relationships:** Builds productive relationships with team members and stakeholders

### Self-belief

- ▶ **Self awareness:** Plays to strengths and is aware of and is working on development areas
- ▶ **Emotional balance:** Is calm and composed under pressure
- ▶ **Openness to challenges:** Embraces new opportunities and challenges as a chance to learn and grow.
- ▶ **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/>