

AFA NATIONAL ROADSHOW 2010

the age of speed...
how to operate in the new environment



Upto 8 CPD Points will be available

NEW FOR 2010
THE TECTONIC PLATES HAVE SHIFTED MASTERCLASS
WITH ANDREW INWOOD, STEVE DAVISON & RICHARD KUPIN

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AMP



LICENSEES

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RUBY



Eilers

Financial Planning
Financial advice that makes sense



INVITATION TO

AFA NATIONAL ROADSHOW 2010

Overview

the age of speed...
how to operate in the new environment

The very popular AFA National Roadshow returns in 2010 with a clear focus on providing insights into:

- Successful business strategies from Award winning Advisers.
- Policy, Regulatory and Government Affairs update.
- Getting the right structure in your business.
- Client Engagement and Advice Skills

Attendance is a must for dynamic advisers looking for ways to enhance their performance & build their practices.

Who should attend?

- ✓ AFA Members
- ✓ Industry BDM's
- ✓ All Advisers & Practitioners
- ✓ GenXt Advisers
- ✓ Paraplanners

What will you learn?

- ✓ Client engagement & advice
- ✓ Building referral networks
- ✓ Handling fear & panic in volatile markets

AGENDA

- 7.30 am** Register
- 7.45 am** Open & Welcome
- 8.00 am** **Session 1**
"Whats really happening in Canberra and why it's important for your business"
Kerry Chikarovski - AFA Political Strategist
- 8.30 am** **Session 2**
"Keeping my practice super fit"
Graham Campbell - AFA Adviser of the Year
- 9.00 am** **Session 3**
"Succession and acquisition after FFA (Minister Bowens changes)"
Steve Davison - AXA Head of Acquisitions and Succession
- 9.30 am** **Session 4**
"Ripoll, Cooper, Henry and the FFA Reforms. What are they and what does it mean for your business"
Richard Klipin - AFA CEO
- 9.55 am** **AFA Student of the year Sponsored by Asteron**
- 10.15 am** Morning tea
- 10.45 am** **Session 5**
"On top of the World"
Chris Southgate - AFA Rising Star of the Year
- 11.20 am** **Session 6**
"The Heart beat of Consumers...."
Andrew Inwood - CEO Brand Management
- 11.45 am** **Session 7**
"How to operate in the new environment"
The Expert Panel
- 12.20 pm** Close and finish

* Please note: Hobart program 12.00pm - 4.30pm

* Please note: No Masterclasses in Hobart

SPEAKERS



NEW FOR 2010 MASTERCLASS

1.00 pm The Tectonic plates have shifted... how to be future
to 3.00 pm ready for 2012

This session will cover:

- What will Minister Bowens FFA reforms will mean to your business
- How to reposition and transition your business to be Future Ready
- How to implement an effective fee base model in your business
- What do consumers really want from you and what you can do about it

Andrew Inwood - CEO Brand Management
Steve Davison - AXA Head of Acquisition and Succession
Richard Klipin - AFA CEO

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KERRY CHIKAROVSKI - AFA Political Strategist

After a career as a solicitor, Kerry Chikarovski was first elected to the New South Wales Parliament in May 1991 to represent the northern Sydney seat of Lane Cove. After thirteen months in Parliament she was appointed Minister for Consumer Affairs. During her time as Minister, Mrs Chikarovski facilitated national agreement to the Introduction of a Uniform Credit Code.



GRAHAM CAMPBELL - AFA Adviser of the Year

Graham serves on several National Boards of Advice and is particularly passionate about providing medical professionals with advice that meets their specialised needs. Graham's aim has always been to provide client-focused advice. The growth of his business has seen the need for a corporate approach utilising specialised staff and client management systems to enhance his ability to service his clients.



STEVE DAVISON - AXA Head of Acquisitions and Succession

Steven is Head of Acquisitions and Succession, for AXA's Financial Advice Network. AXA's Acquisition and Succession team has a demonstrated track record. Steven is passionate in helping practice principals build sustainable advice businesses that will continue into the next generation. Steven has been with AXA for thirteen years with various previous roles.



ANDREW INWOOD - CEO Brand Management

Andrew Inwood is the principal of Brand Management and has more than 18 years experience in the Australian financial services industry. He worked for Rothschild Australia Asset Management where he headed the marketing team for four years before moving to AMP Investments where he spent more than a decade as head of marketing.



CHRIS SOUTHGATE - AFA Rising Star of the Year

The vision Chris has for his business is reflected in the way he deals with his clients on a day-to-day basis. As an insurance specialist for the medical industry, Chris's aim is to build a loyal and exclusive client base – providing them with exceptional advice and service.



RICHARD KLIPIN - AFA Chief Executive Officer

Richard is the Chief Executive Officer of the Association of Financial Advisers. He started in this role in January 2006 with a brief to build & reposition the AFA as a key body representing Advisers in the Industry.

WHERE & WHEN?

PERTH NATIONAL ROADSHOW

Tuesday 20th July 2010

Burswood

Astral Room 1 & Foyer

7.30am - 12.20pm

Masterclass - 1.00pm - 3.00pm

ADELAIDE NATIONAL ROADSHOW

Wednesday 21st July 2010

Adelaide Pavilion

7.30am - 12.20pm

Masterclass - 1.00pm - 3.00pm

HOBART NATIONAL ROADSHOW

Thursday 22nd July 2010

Hotel Grand Chancellor

12.00pm - 4.30pm

MELBOURNE NATIONAL ROADSHOW

Tuesday 27th July 2010

Hilton on the Park

7.30am - 12.20pm

Masterclass - 1.00pm - 3.00pm

SYDNEY NATIONAL ROADSHOW

Wednesday 28th July 2010

Doltone House

7.30am - 12.20pm

Masterclass - 1.00pm - 3.00pm

BRISBANE NATIONAL ROADSHOW

Thursday 29th July 2010

The Sebel King George

The Presidential Ballroom

7.30am - 12.20pm

Masterclass - 1.00pm - 3.00pm

NOTE: This program may differ slightly.

PARKING: There is ample parking available for all venues. Please contact venues for further details.

Masterclass: The Tectonic plates have shifted

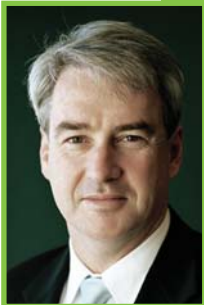
What Minister Bowens FFA reforms will mean to your business...

How to reposition and transition your business to be Future Ready for July 2012

This session with Andrew, Steve & Richard will explore the following key issues:

- ✓ Detail of the FFA reforms.
- ✓ How to build a sustainable fee model in your practice.
- ✓ What is a fiduciary duty & how do you need to manage this.
- ✓ Options for Clients... what does this really mean.

THIS SESSION IS NOT TO BE MISSED



ANDREW INWOOD | BRAND MANAGEMENT CHIEF EXECUTIVE OFFICER

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AFA Member Testimonials

86% of last years attendees found the Roadshow would add value to their business.

- “Great content, lots of really good ideas”
SA Attendee
- “I loved the passion, the variety of the speakers & the buzz in the room”
NSW Attendee
- “Very inspirational & very well done”
Vic Attendee
- “Today’s event was really excellent”
WA Attendee
- “Great insight, thanks for the great ideas”
Tas Attendee
- “Great to see successful planners sharing their secrets of success.”
Qld Attendee

“

Very inspirational & very well done.

Sandra Braun



Great to see successful planners sharing their secrets of success.

Michael Nowak



The Roadshow was awesome and very relevant for my business.

Sarah Wood

”

Please send or fax all registration forms to the AFA National Office:

AFA NATIONAL OFFICE

JANELLE SAUNDERS

PO Box Q279, Queen Victoria Building NSW 1230

Ph: (02) 9267 4003

Fax: (02) 9267 5003

Email: janelle.saunders@afa.asn.au

MELISSA FAVALORO

PO Box Q279, Queen Victoria Building NSW 1230

Ph: (02) 9267 4003

Fax: (02) 9267 5003

Email: melissa.favaloro@afa.asn.au

All registrations will be confirmed by email.

A receipted tax invoice will be emailed to the address on your registration form.

REGISTRATION

AFA NATIONAL ROADSHOW 2010

National Roadshow Only
 Masterclass Only
 National Roadshow and Masterclass Package

1. PERSONAL DETAILS

Title: Name:

Surname:

2. CONTACT DETAILS

Company:

Mailing Address:

City: State: Postcode:

Phone: Fax:

Mobile: Email:

Special Requirements (e.g. access, dietary, other):

3. WHICH STATE WILL YOU BE ATTENDING? (PLEASE TICK BOX)

SA
 NSW
 VIC
 WA
 QLD
 TAS

4. NUMBER OF PEOPLE ATTENDING? (PLEASE PROVIDE NAME & EMAIL)

1. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
2. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
3. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
4. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
5. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
6. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
7. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
8. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
9. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member
10. <input type="text"/>	<input type="checkbox"/> AFA Member	<input type="checkbox"/> Non Member

REGISTRATION

AFA NATIONAL ROADSHOW 2010

5. COST

\$80 AFA Members - \$100 Non AFA Members. (includes gst) • **Includes: Hot Breakfast & Morning tea for all sessions.**

Tables of 10 for AFA sponsors & members @ \$850 (includes gst)

Tables of 10 for AFA non members @ \$1,000 (includes gst)

Masterclass - \$55 AFA Members - \$75 Non AFA Members. (includes gst) • **Includes: Light lunch**

PACKAGE DEAL

Roadshow plus Masterclass \$120 AFA Members - \$155 Non AFA Members

6. PAYMENT DETAILS

Please charge \$ (gst incl) to my (please tick) Bank Card Master Card Visa AMEX

Cardholder's Name:

Credit Card Number: Expiry Date: /

Signature:

Enclosed is my cheque made payable to: Association of Financial Advisers Ltd.

EFT - BSB 082-926 A/C No. - 028 57 3951

Ref: (date of event) / Surname:

Privacy and Delegate Policy

In registering for this roadshow / conference I agree to relevant details to be incorporated into a delegate list for the benefit of all delegates (name and institution only) and may be made available to parties directly related to the roadshow / conference including the AFA, Conference Plus, venue and accommodation providers (for the purpose of room bookings and roadshow / conference options) and key sponsors (subject to strict conditions).

I do not wish to have my name placed on the delegate list –

Please indicate No

Cancellation Policy

The AFA will refund the cost if the applicant notifies the AFA seven days prior to the commencement of the program of their intention not to attend. If you do not notify the AFA seven days prior to the commencement of the program you will not be entitled to a refund. You may nominate another person to attend in your place.