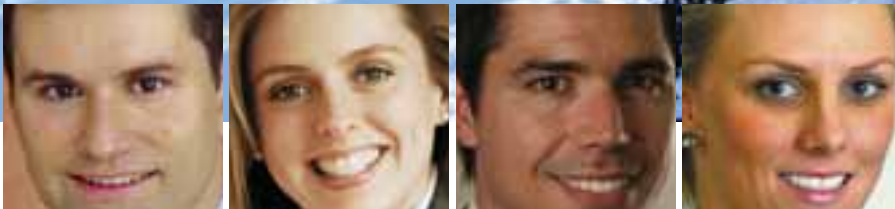


creating the future...

**UP TO  
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**EARLY BIRD OFFER NOW OPEN**  
**Closes 30 JUNE 2009**

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**AFA Membership PLUS**  
**Conference Registration**  
**Bundle Package**  
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**FORM INSIDE**



Focusing on the exciting and dynamic future of the Financial Advising Industry

**GenXt**  
bridging the gap...



# Program Preview

## CHAIRMAN'S welcome to Conference



Building on the huge success of the 2008 National Conference, the AFA is planning an even better conference for 2009. As always the conference is being planned by practising advisers so will focus on meeting the current needs of those working in the industry.

Of course the AFA National Conference is renowned for its high quality speakers, engaging plenary sessions filled with in-depth content, invaluable networking opportunities and fantastic social program.

I invite you to join me for what is shaping up to be the best ever AFA National Conference. I look forward to seeing you at the Gold Coast.

Troy Edmondson, Conference Chair



## Darren Flanagan Sponsored by AIG

*"The Gun behind the Beaconsfield mine rescue"*

Darren Flanagan was crucial to the rescue of Todd Russell and Brant Webb from the infamous Beaconsfield mine disaster.

Nicknamed "The Gun" by Todd and Brant, he was the man who charged and fired 65 shots of explosives that eventually released them from their tomb 925m underground. Flanagan's electrifying, emotional and detailed story about one of Australia's most dramatic mine rescues inspires and impresses!

Darren Flanagan is a humble and reluctant celebrity who passionately communicates his story of planning, test blasting and finally exploding the rescue path to within 35 cm of Todd and Brant, an incredible 1km beneath the earth's surface. Darren's story has captivated and inspired audiences of programs including Sunrise at Seven, The Today Show, A Current Affair and Sixty Minutes.

## Peter Baines

Sponsored by MLC

**“ Fail to plan, then plan to fail”. This saying is fine if you have the time to plan, but what happens in a crisis? In crisis management, the Crisis Clock starts ticking as soon as the event unfolds. ”**

## The Crisis Clock – Hope is not a Plan

In this keynote presentation Peter takes the audience on a journey through each stage of the Crisis Clock, showing that each stage is transitional and sometimes without clear endings or beginnings. As the Clock ticks on, so do the challenges and the emotions surrounding each stage.

Whether you are a business owner, or a junior team member working on your very first project, The Crisis Clock increases awareness of each of the stages you will experience during the project's life cycle. This enables you to better prepare for challenges and manage the emotions and morale of yourself and your team.



Peter Baines is an expert at creating successful results starting from nothing – no time, no money, no staff, but as Peter says, "No worries". Throughout almost two decades Peter has experienced and led people through some of life's most challenging events.

During a police career spanning over two decades, Peter came up against some of the most confronting natural disasters and acts of terrorism in recent times; making him one of Australia's most experienced disaster management specialists. His roles have included leading both national and international teams following the Bali bombings, the Waterfall train disaster and the Boxing Day Tsunami.

These experiences enable Peter to offer a rare insight into what it takes to lead powerfully and with compassion, within the most extraordinary of circumstances. Taking his audience into a world that many would never dare to tread. Peter provides a journey into the fascinating world of crisis leadership and forensic science; in addition to his own experience of what it really takes to achieve results amidst unrelenting change.

# “Future of Financial Advice in Australia”

A Panel of Industry leaders. This Industry Panel will address a raft of key issues facing the advisory profession.

These issues will include:

- the role of adviser
  - the future of Superannuation
  - the Parliamentary Joint Enquiry
  - Insurance and savings adequacy in Australia
- as well as time for questions from the floor.



Richard Klipin  
CEO AFA



Robbie Bennets  
CEO PIS



David Whiteley,  
Executive Manager  
Industry Super  
Network



Christina Kalantzis  
Principal Alexis



Sponsored by Asteron

## Chris Browne The 1 Percent -

### “If it’s possible, do it!”

The dynamic experience that 14 people within the financial planning community (The 1 Percent) undertook in January 09 to build 2 homes

for the underprivileged over 2 weeks. The experience takes the audience through the practicalities of the initial fundraising, difficulties of working through forming the two teams and working within different cultures, how the team connected with local communities which lead to dramatic changes from the original plan. The 1 Percent team originally set out to build 2 houses but their time in Cambodia lead to a very personal change and the ongoing support of The Green Gecko Orphanage.

This presentation is an ‘outside the box’ session with a focus on the experience that the advisers went through and the amazing personal/professional growth that they experienced. I have an ongoing commitment to ensuring that others in our industry get the opportunity to have a similar experience and believe it would be especially valuable to AFA members to see how you can give back in times of stress and economic downturn when it is often easier to do nothing at all.

The top three things attendees will learn from this session:

1. **Leadership** – the difference it makes when driven by the vision of making a sustainable, positive change.
2. **Motivation** – showing how the planning community of 14 people selflessly and unconditionally helped those less fortunate. This proved to be the tip of the iceberg.
3. **Balance** – successful businesses and happy clients is just the beginning. Satisfying personal relationships and helping those less fortunate is ultimately the main game.

# Program Preview cont...

## Alischa Ross Sponsored by CommInsure

### Turning tragedy into triumph: Shaping the Next Generation of Australians to know how to say 'YEAH'

- Key moments from my personal story of growing up with HIV in a 'regular' Australian family, the loss of my mum, sister and step father and how my greatest challenge has led to the greatest rewards.
- The role of mentors and the importance of surrounding yourself with great people, but remembering that everyone has their own agenda and to never lose sight of your own vision.
- Commitment; it's a long road to creating change, staying on track, finding motivation, being inspired, inspiring others.



Alischa Ross, founder and CEO of YEAH, Australia's first youth focused HIV/AIDS organisation, is a 28 year old woman who has dedicated herself to empowering young people to realize their place in the global response to HIV and AIDS.

Her work in the international arena has enabled Alischa to gain the experience of working with international health authorities and leadership networks including the Global Youth Coalition on AIDS (GYCA), UNAIDS, The National Institutes of Health and The Waldzell Institute. In 2007 Alischa was nominated as a finalist for the Young Australian of the Year award in recognition of her work.

Alischa has worked as a professional public speaker for the past eight years, presenting on the international stage in academic forums, teaching workshops and in an advisory context to local and national governing bodies. Her strength of communication has allowed her to engage with a variety of radio, television and print media throughout various roles and assisted in growing the public profile of YEAH. Alischa is currently undertaking her Masters in Public Health.



*Sponsored by  
Commonwealth Bank*

## Craig James



On leaving school Craig James joined the (then) Rural Bank, whilst undertaking university studies. He received his Bachelor of Commerce (Economics) at University of NSW in

1984 and then a Master of Commerce (Economics) at the same university in 1988.

He remained at the Rural Bank, which became the State Bank over time and then Colonial, working in branches, Corporate, Planning and Economic Research.

He became chief economist of Colonial Group in September 1987, before becoming chief economist at CommSec in August 2000 with the Commonwealth takeover of Colonial.

In 2002 Craig had a sea-change, joining the Australian Financial Review. He had always wanted to pursue a role in journalism and enjoyed the

role as an economic commentator and analyst, finding that he could pursue a journalistic-type role as well as doing more electronic media work at CommSec and rejoined the group in 2003.

On taking the reigns of chief economist at Colonial, Craig endeavoured to style their research in a "user-friendly" way – something that set their research apart and still does today. The approach has been successful in their media work and in promoting Colonial, and then CommSec, to the general public. CommSec is the most quoted economic group in the mainstream media.

CommSec economic reports are a bit different in that they devise tools such as the 'Mums and Dads' share index and the iPod index, and undertake research on the weather and demographic changes to show how they affect the economy.

Craig currently does around 2-3 regular TV crosses a day, ad hoc radio and newspaper interviews and writes regular commentaries as well as presenting to staff, clients and external organisations.

Outside work, Craig's main interests are athletics (cross country in winter), weight training, reading widely across a range of newspapers, magazines and electronic media, and trying to keep up with the children.



# DARRYL LOVEGROVE

## The Three Waiters

### An Idea Whose Time Had Come

Sponsored by ING



THE THREE WAITERS  
.....(or are they?)

The inspirational story of how two blokes in Redfern created the world's biggest corporate entertainment act performing over 8,000 times in more than 65 countries and turning over more than \$30 million! Against all odds Darryl Lovegrove and his business partner Mark Bradley revolutionised entertainment in the corporate world and in the process gave birth to "The Three Waiters" - a phenomenal success that has transcended international gender and cultural differences. In this highly entertaining and informative session, the co-creator and founder of "The Three Waiters", Darryl Lovegrove will tell you exactly how they did it, what keeps them going and why they continue to succeed in an industry particularly hard hit by the worldwide economic crisis. You may even learn to sing!

By age 27 Darryl had starred in musical blockbusters Les Miserables and Chess and Jesus Christ Superstar. He has performed with theatre greats Sarah Brightman, Rob Guest and Anthony Warlow; and received rave reviews as John Lennon in the acclaimed Looking Through a Glass Onion.

Aged 30, he co-created the worlds' leading operatic Corporate Entertainment Act "The Three Waiters". Within 10 years they employed 80 opera singers worldwide and had performed over 7,000 shows in 65 countries.

## MEET THE Professionals

2009 brings you one of the standout successes from the past two Conferences, "Meet the Professionals".

In 2009 we have created the following 6 topic areas to focus on:

- |                       |                        |
|-----------------------|------------------------|
| 1. Business Insurance | 4. Trauma Insurance    |
| 2. Superannuation     | 5. Practice Management |
| 3. Investments        | 6. X factor            |

3-5 specialist sessions will be created to provide insight & focus into these key topics.

This session will give all delegates a chance to spend 30 minutes with their preferred topic leader. Topics will cover a range of issues for you and your practice.



## AFA FOUNDATION update

The AFA is committed to extending the focus of its work beyond the financial planning industry into helping the community. To achieve this, the AFA has formed a partnership with MSRA, Make a Wish Foundation and Legenis.

The objectives of the Foundation are to:

- Engage AFA Members in raising funds and raising awareness with our chosen charity partners.
- Ensure the community spirit of sharing is part of the AFA philosophy.
- Work with our charity partners to make a difference in their lives.
- Educate AFA members in the areas of philanthropy and giving.

The AFA has already raised close to \$300,000 in the past 2 and a half years. This is a fantastic result and our objective is to double this in the next six months.



# NEW FOR 2009 CONFERENCE

## BDM, PDM, BDO & BSO Masterclass

### How relevant are you to your best advisers?

Join the Pre-Conference Workshop with the Business Health team

Are you a BDM/PDM/BDO & BSO who ....

- ✓ Adds value to your adviser's business
- ✓ Takes ownership of those issues
- ✓ Provides your advisers with business concepts that assist their clients
- ✓ Seeks feedback as to how to improve their service/product
- ✓ Assists with claims/underwriting/ completion of tough cases.
- ✓ Assists your team to develop strong relationships with an Adviser's support staff

In this workshop the Business Health Team will explore the following:

- The advisers' world. How are advisers handling today's market place? What are they good at and where do they need help.
- What do they currently think of their BDM/BDO/PDM?
- How are some of your peers adding real value to their adviser relationships? Panel discussion.
- Top 5 attributes of a successful BDM.

The Pre-Conference Workshop will run Saturday morning 3rd October from 10.00am till 1.30pm



Terry Bell

“ *There is a massive need in the industry for the transformation of the BDM/PDM. Generally speaking, they haven't kept up with the changing role of the adviser. Their behaviors simply aren't changing fast enough.* ”

Business Health strategic partner  
Ray Schlafani, CEO Clientwise.

”

# NEW FOR 2009 CONFERENCE

## "Leadership Matters" Masterclass

### Join the Masterclass with Keynote Speaker and Leadership Expert **Peter Baines**

In this Masterclass Peter will explore the following:

- How to be a leader with no positional authority;
- How to communicate when no one speaks the same language;
- How to be creative with no resources;
- How to keep your head when everyone else is losing theirs;
- How to lead with power and compassion;
- How to build high-impact teams, quickly;
- How to transition back into "real life" crisis



Peter Baines

*“ Peter, just wanted to tell you that your talk was the high point of the three days for me. I have thought of it often and I am still stunned at the work that you and your colleagues do. I was also impressed with your skill in presenting a difficult and emotional topic in such an impactful way. ”*

Myra-Ann Pickens  
COMMONWEALTH BANK

**The Masterclass will run  
Sunday morning 4th October  
from 8.30am till 11.00am**

- Leadership • Project Management • Decision Making • From Plan to Plan • Communication
  - Building Powerful Teams • Clarity of Purpose • Crisis Management
- Consequence Management • Resource Management • Negotiation Under Pressure

# Social Events for Delegates & Partners

**Saturday 3 October**  
**1.00pm – 6.00pm**

## **AFA Charity Golf Tournament**

**sponsored by ITC**



Discover new ways to play with the Gold Coast's only 27-hole composite golf course at Royal Pines Resort!

With undulating terrain, magnificent greens and tight fairways that demand respect, this is the golf encounter you've been waiting for.

Three distinct course layouts offer three unique golf course experiences and promise to challenge a golfers every stroke.

**COST:** \$110.00 per person

Includes: 18 holes golf, golf cart, trophy presentation & BBQ dinner.



Hire Clubs are \$45.00 per set we have Mens & Ladies, Right & Left Handed available.

### **DRESS CODE IS AS FOLLOWS**

Acceptable

- Collared shirt
- Tailored shorts
- Long/Short socks
- Golf/Sports Shoes

**Saturday 3 October - 2.00pm - 5.30pm**

## **AFA GenXt Beach Olympics**

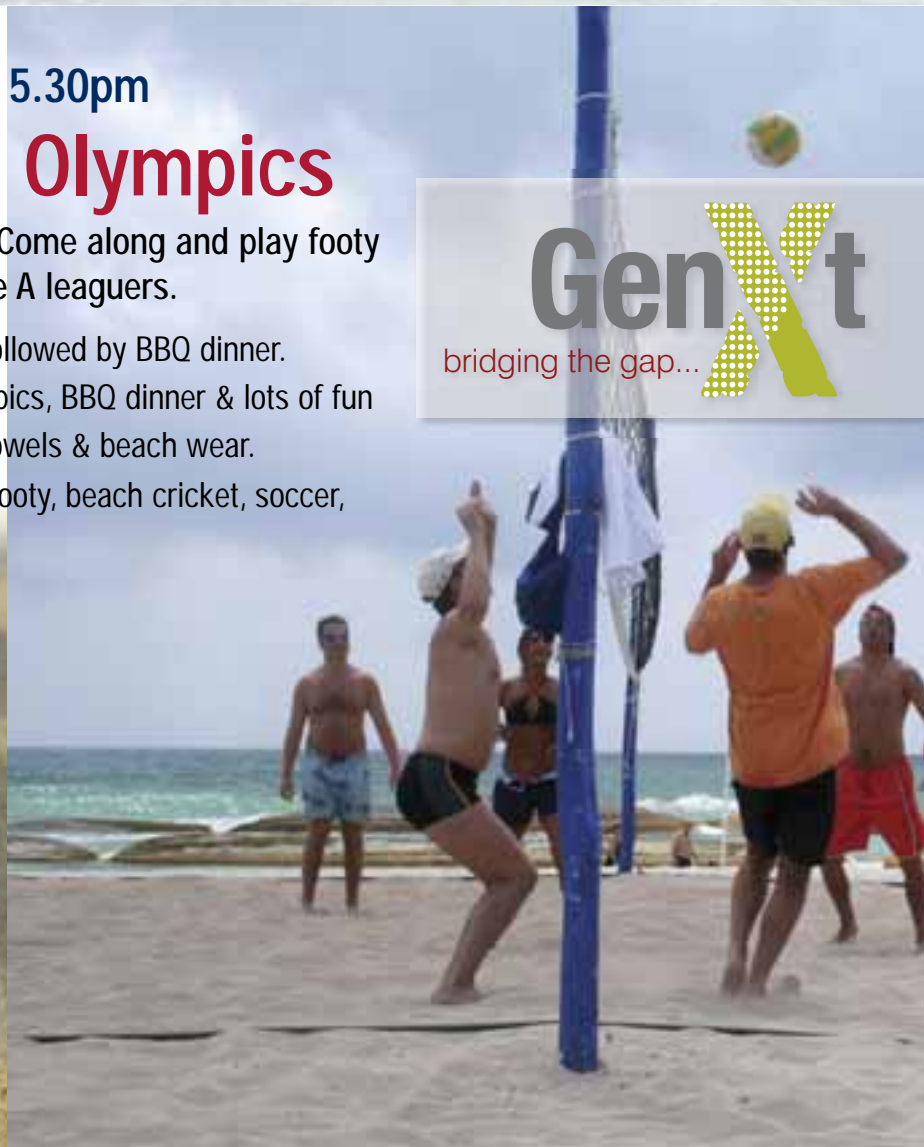
For the Genxters or Genxters at heart...Come along and play footy with the Titans or maybe Soccer with the A leaguers.

**Where:** The best Beach on the coast. To be followed by BBQ dinner.

**Cost:** \$60 per person - Includes beach olympics, BBQ dinner & lots of fun

**What to bring:** Hat, sunscreen ,swimmers, towels & beach wear.

**Purpose:** Have fun, learn to surf, play touch footy, beach cricket, soccer, basketball. All this & networking too!



# AFA 2009 CONFERENCE SOCIAL PROGRAM

## for delegates & partners

**SUNDAY OCTOBER 4**

**AFA WELCOME PARTY - NIGHT OF STARS**  
7.00pm-10.30pm

### **Moonlight and Stargazing by the Pool at Royal Pines Resort**

The Conference Welcome Party is a great opportunity to meet up with new friends, catch up with old friends whilst soaking up the resort atmosphere. We will also celebrate with the winner of the AFA Rising Star of the Year. So don't miss out on the evening of fun with friends and colleagues. Proudly supported by ING.

**MONDAY OCTOBER 5**

**AFA GENxT IDOL NIGHT: 9.30pm-12.00am**

**VENUE: HYDRATE BAR - All Delegates Welcome!!**

Who will be the next AFA idol? Join with your conference colleagues to get down to your favourite songs. Sing solo, sing in a group, sing in and out of tune, it doesn't really matter but come and have a sing along with the AFA Big Band - it's sure to be a BLAST!!

**TUESDAY OCTOBER 6**

**AFA GALA AWARDS DINNER - PLATINUM BALL**  
7.00pm-12.00am

A fun filled night with glamour and awards, this party is not to be missed. Celebrating the AFA Adviser of the Year Award sponsored by Zurich and AFA's contribution to helping Australians secure their future. Proudly supported by Zurich. The AFA Foundation will hold their silent auction for charity.

Theme: Platinum Ball Black Tie Dinner with fantastic entertainment.



## FAMILY PROGRAM for partners & families

Organisers of the AFA Conference 2009 welcome and look forward to the attendance of delegate partners and families to the Gold Coast. The AFA has negotiated very special accommodation rates for the 5 days pre and post the conference. This is to encourage delegates to bring their families and take a break prior to, during and after the conference. There are a range of fantastic facilities on the resort from kids playground, resort pools and gymnasium and tennis courts.

For partners tours see flyer on conference website [www.afa.asn.au](http://www.afa.asn.au) or contact your conference secretariat.

Childminding facilities are available through Concierge. Royal Pines Resort employ fully accredited agencies with friendly, blue card accredited staff; possessing first aid certificates and flexible minding rates. To book, please call the friendly Concierge team on 07 5597 8700, 24 hours notification is required.



# AFA NATIONAL CONFERENCE program



## PROFESSIONAL DEVELOPMENT SESSION STREAMS

Following a very successful 2008 Conference, and based on your feedback, the 2009 Conference will include the following session streams.

### GenXt Stream

These sessions are designed for younger advisers or those looking for a refresher. There will be many good stories, tips & opportunities on offer in this stream.



### Practice Development Stream

These sessions are designed for all advisers looking for business management tips & ideas from successful practitioners & industry leaders. There will be a range of interesting content designed to challenge your thinking & expand your thinking.

### Investment & Technical Stream

These sessions are designed for all advisers looking to grapple with a range of technical & investment issues & case studies.

## Saturday 3 October, 2009

10.00 am - 1.30 pm	<b>"How relevant are you to your Advisers?"</b> BDM/PDM Masterclass - with Business Health Team
2.00 pm - 6.00 pm	<b>"AFA Charity Golf Tournament"</b> - Sponsored by ITC
2.00 pm - 6.00 pm	<b>"GenXt Beach Olympics"</b>

## Sunday 4 October, 2009

6.30 am	Partner EXPO: Bump-in & Set up
8.00 am	Registration Desk Opens
8.30 - 11.00am	<b>"Leadership Matters Masterclass"</b> with Peter Baines
11.45 am	Lunch - AFA Expo
12.30 pm	Conference Welcome & Opening Ceremony
1.00 pm <b>KEYNOTE 1</b>	<b>"Future of Financial Advice in Australia"</b> A high level Industry Panel will address this topic
1.40 pm <b>KEYNOTE 2</b>	<b>"Hope is not a plan"</b> Peter Baines - Sponsored by MLC
2.25 pm <b>KEYNOTE 3</b>	<b>"Hope is not a plan" - continued...</b> Peter Baines - Sponsored by MLC
3.10 pm	Afternoon Tea - AFA Expo
3.40 pm <b>KEYNOTE 4</b>	<b>"Turning Tragedy into Triumph"</b> Alischa Ross - Sponsored by CommInsure
4.20 pm	AFA Rising Star Award Presentation - Sponsored by ING
4.50 pm	Close
5.00 pm	NRL Grand Final at the Hydrate Bar
7.00 - 10.30 pm	AFA Welcome Party - Night of Stars
10.30pm onwards	After party at the Hydrate Bar

## TESTIMONIALS

... what attendees said about the 2008 AFA National Conference

**93% of attendees rated the content of the 2008 conference as very high**

*"Something for all advisers"*

*"Good educational value"*

*"Congratulations on a great conference"*

*"A wonderful mix of topics and speakers"*

*"Best conference yet"*

*"Congratulations to Richard and the Team for putting on a good show, great to see the numbers growing"*

*"Quality of program"*



"The AFA annual conference is a key event for us each year that provides us both education and a unique networking opportunity."

**Malcolm Arnold**



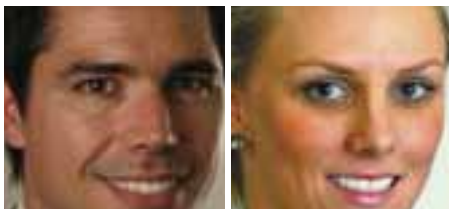
"I was really happy with the conference, all the staff and speakers were awesome."

**Sarah Riegelhuth**



"You've raised the bar and I will attend in 2009."

**Paul Daily**



# creating the future...

## Monday 5th October, 2009

7.15 am  
**BREAKFAST A**

**AFA BREAKFASTS - Choice of A or B Breakfast**  
**MDRT Breakfast - Sponsored by AXA**  
The cream of the crop will gather at the Annual MDRT breakfast

**BREAKFAST B**

**GenXt Breakfast - Sponsored by AMP**  
"Understanding the personality styles of your clients"

9.00 am  
**KEYNOTE 5**

**The 1 Percent - "If it's Possible - Do it"**  
Chris Browne - sponsored by Asteron

9.45 am  
**PLENARY**

**The Secrets to my Success**

10.00 am  
**PLENARY**

**Meet the Professionals**  
Your chance to meet with industry leaders on a range of topics. You can choose 2 sessions from the 30 on offer

11.10 am

**Morning Tea - AFA Expo**

11.40 am

**SESSION STREAM 1**

**GENxT**

**"Why GenXters should be talking to business owners about their futures"**  
Russell Collins: Director, Genysys Wealth Advisers

**PRACTICE DEVELOPMENT**

**"Building a sustainable relationship with your Centre of Influence"** John Eales: Director, The Peak Partnership

**INVESTMENT & TECHNICAL**

**"View from the CMO's desk"**  
How well do you know your definitions? Dr John Clubb: CMO, Tower

12.30 pm

**Lunch - AFA Expo**

1.25 pm

**SESSION STREAM 2**

**GENxT**

**"Future Proofing your business by building a unbeatable niche market offer"**  
Mark Westacott: Adviser, Financial Wisdom

**PRACTICE DEVELOPMENT**

**"Surviving and Thriving in the current market environment"** Adviser Panel facilitated by Michael Harrison

**INVESTMENT & TECHNICAL**

**"Facing the new reality...Practice Management in a Recession"**  
Michael Kinens: iress

2.15 pm

**SESSION STREAM 3**

**GENxT**

**"Case Study: Financial Planning for Families & Inter-Generational Wealth Change!"** Jonathan Davis: Adviser

**PRACTICE DEVELOPMENT**

**"Building a sustainable position for your clients"**  
Panel facilitated by Simon Harris: CommInsure

**INVESTMENT & TECHNICAL**

**"Building sustainable retirement incomes strategies. What have we learnt from the GFC"**  
Adviser panel facilitated by Matt Gaden: Challenger

3.05 pm

**Afternoon Tea - AFA Expo**

3.35 pm  
**PLENARY**

**AFA Student of the Year Awards**  
Sponsored by Asteron

4.00 pm  
**PLENARY**

**AFA Service Awards**  
AFA awards to Industry Contributors

4.15 pm  
**KEYNOTE 6**

**"Global Economic Update"**  
Craig James: Chief Economist CommSec - Sponsored by CBA

5.00 pm  
**KEYNOTE 7**

**"From Redfern to New York": How the three Waiter became a global Brand & changed Corporate Entertainment**  
Darryl Lovegrove - Sponsored by ING

5.45 pm

**AFA Cocktail Party - Sponsor Area**

6.30 pm onwards

**Evening at Leisure**

9.30 pm -12 pm

**GenXt Idol at the Hydrate Bar with AFA Band**

## Tuesday 6th October, 2009

7.15 am  
**BREAKFAST A**

**AFA BREAKFASTS - Choice of A or B Breakfast**  
**Business Insurance Breakfast - Sponsored by Aviva**  
"Exploring the untapped SME market"

**BREAKFAST B**

**NAB Best Practise Breakfast - Sponsored by NAB**  
**Financial Planner Banking**  
"How to drive you business ahead of the pack through specialisation"

9.00 am

**SESSION STREAM 4**

**GENxT**

**"The Adviser of the future...what skills, knowledge and competencies will you need to thrive & success in the future?"** Dr Mark Sinclair

**PRACTICE DEVELOPMENT**

**"Get the right Dealer group option for your business... Large, small, independent or institutional"**  
Panel discussion facilitated by Ian Anderson: CBA Lending

**INVESTMENT & TECHNICAL**

**"Underwriting & Claims: Where does it all really start"**  
Troy Edmondson & Simon Dent: Aviva

9.50 am

**SESSION STREAM 5**

**GENxT**

**"How to buy your first business"**  
GenXT panel with Ryan Watson, Mary Benton & Brad Fox

**PRACTICE DEVELOPMENT**

**"The New Age Long-term Approach to Client Engagement"** Dr Robb Musgrave

**INVESTMENT & TECHNICAL**

**"Is there a place for Agri in your clients portfolio"**  
Adviser Panel with ITC

10.45 am

**Morning Tea - AFA Expo**

11.15 am  
**PLENARY**

**AFA AGM**

12.15 pm

**Lunch - AFA Expo**

1.00 pm

**SESSION STREAM 6**

**GENxT**

**"Coming to the dark side"** Kylie McIntosh: Partner, Ulton Group

**PRACTICE DEVELOPMENT**

**"Building an award winning business"**  
Adviser of the Year panel facilitated by Zurich

**INVESTMENT TECHNICAL**

**"Business Financial Planning Opportunities"**  
David Shirlow: Macquarie

1.50 pm

**SESSION STREAM 7**

**GENxT**

**"What are clients really saying about their advisers: Insights from client research"** Business Health

**PRACTICE DEVELOPMENT**

**"How to attract the right new clients to your business"**  
Sam Aylett: AXA

**INVESTMENT & TECHNICAL**

**"Cash is king.... But for how long?" When is the right time to dip your toes back into equities?**  
Lessons learnt from the GFC with Paul Cuddy: CIO, Bannelong FM

2.40 pm

**Afternoon Tea - AFA Expo**

3.10 pm  
**PLENARY**

**The Secrets to my Success**

3.20 pm  
**KEYNOTE 8**

**"The gun behind the Beaconsfield Mine Rescue"**  
Darren Flanagan - Sponsored by AIG

4.20-4.30pm  
**PLENARY**

**Conference Close**

7.00-11.30pm

**AFA Gala Awards Dinner: Platinum Ball**  
- AFA Adviser of the Year sponsored by Zurich

# AFA EVENT HIGHLIGHTS

## AFA AWARDS program

An integral part of strengthening any industry is celebrating excellence. The AFA awards program recognises the achievements of current and future leaders.

### AFA Adviser of the Year: Sponsored by Zurich

**AFA Gala Awards Dinner on Tuesday evening, 7.00pm - 12am**

Find out who will be crowned the 2009 AFA Adviser of the Year at the Gala Dinner. This award is now in its 8th year and highlights the achievements and commitment to excellence in both the industry and the community.



### AFA Rising Star Award: Sponsored by ING

**Awards ceremony on Sunday Afternoon**

Meet future industry leaders at the presentation of the AFA Rising Star of the Year Awards. Sponsored by ING for the 5th year in a row, these awards recognise young practitioners who have achieved a great deal in a short time.



### AFA Student of the Year Awards: Sponsored by Asteron

**Awards ceremony on Monday Afternoon**

With the launch of the AFA's post nominal, FChFP, the AFA is very proud to present the Student of the Year Awards. These awards are now in their second year and will recognise the best and brightest students entering the industry.



### AFA Service Awards & Cocktail Party Monday Afternoon

Why has the AFA been so successful for 64 years? Because it has always been an association run by advisers for advisers. Join us at this cocktail party to thank the many members who have volunteered countless hours of service to build and shape the AFA into the association we value so much today.

## AFA BREAKFAST workshops 7.15am - 8.45am

The conference breakfasts will allow you to explore depth key issues relevant to your own practices. Whether you are a new or experienced adviser you will find something of interest in these workshops. (includes cooked breakfast and dynamic speaker)

### MDRT Breakfast

**Monday morning 5th October 2009**

Sponsored by AXA

The cream of the crop will gather at the Annual MDRT breakfast.



### AFA Business Insurance Breakfast

**Tuesday morning 6th October 2009**

Sponsored by Aviva

**"Exploring the untapped SME market"**

At this breakfast you will have the opportunity to hear from one of Australia's leading specialists law firms about some of the practical issues which need to be considered when providing advice around the contingency planning needs of your SME clients.



### GENxT Breakfast

**Monday morning 5th October 2009**

Sponsored by AMP

**"Understanding the personality styles of your clients"**

At this we will explore personality styles and how best to engage with your clients.



### NAB Best Practise Breakfast

**Tuesday morning 6th October 2009**

Sponsored by NAB Financial Planner Banking

**"How to drive your business ahead of the pack"** Practical examples of financial planning practices succeeding through specialisation.



# Partners

Big events like these don't happen without support from partners. The AFA would like to thank and recognize the following companies for their support. (current as at APRIL 2009)

## Platinum



**CommInsure**



## Gold



**FutureStaff**



## Silver



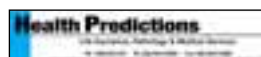
**CommonwealthBank**



## Partner Stands



**AFA Preferred Charity**



# ACCOMMODATION information



Accommodation has been 'block booked' by Conference Plus to ensure availability and to provide an efficient and convenient reservation service. To avoid disappointment and rooms being double booked, accommodation bookings MUST be made through Conference Plus.

To guarantee your room, a deposit of one rooming night must accompany all bookings. This deposit will be credited to your accommodation account with the balance payable upon departure. A Tax Invoice will be issued by your hotel on checking out for all accommodation payments. Accommodation prepaid in full is also an acceptable option.

Standard hotel check in and out times apply. Check-in 2.00pm and check out 11.00am - unless direct alternative arrangements are made with your hotel.

**REGISTER BEFORE JUNE 1, 2009**

**for your chance to win 2 FREE nights accommodation at RACV Royal Pines\* see website for more info** \*conditions apply

## RACV, ROYAL PINES RESORT

### 5 STAR RESORT

ROSS STREET, ASHMORE, GOLD COAST, 4214 AUSTRALIA

RACV Royal Pines Resort on Queensland's Gold Coast is one of Australia's largest fully integrated business lifestyle and sporting resorts. Located 12 minutes from the centre of Surfers Paradise this luxury hotel is nestled between the famous Gold Coast surf beaches and the subtropical rainforests of the Hinterland. In addition to 331 guest rooms, a multi award winning convention centre, and 4 individual restaurants, the resort is also home to a full compliment of health and fitness facilities providing a visitor experience unlike any other.

#### RATES

Room type	Per-room per night rate	
Mountain View Rooms	- Single/Double/Twin	\$180.00
Park/Pool View Rooms	- Single/Double/Twin	\$190.00
Coastal View Rooms	- Single/Double/Twin	\$200.00
Each Additional Person		\$ 45.00

## How to get to the Conference

### AIR TRAVEL

Corporate Travel Management (CTM) is the official travel agency for AFA 2009 Conference travelling. CTM offers the best internet or published airfares available on Qantas, Virgin Blue Airlines and Jetstar when travelling internally within Australia.

To ensure the BEST airfare available ALL delegates are urged to contact CTM. TOLLFREE: 1800 630 866 quoting AFA 2009 or book direct on-line on <http://www.travelctm.com/bookings>.

### TRAVELINSURANCE

Travel insurance is highly recommended and covers your conference registration fees and travel costs in the case of unforeseen circumstances. Just general insurance or a domestic premium is also available. CTM Groups consultants are able to assist with information and sending the insurance brochure for your perusal.

### TRANSFERS

#### PUBLIC SHUTTLE SERVICE – To and from the airport

The conference secretariat has negotiated for all AFA domestic and international travellers and their families a 10% discount off the Gold Coast Tourist Shuttle Services' advertised prices. To be eligible for your 10% discount and to ensure that sufficient seating capacity is provided, you must provide the shuttle service with your flight details together with payment no later than 4 days prior to the commencement of the conference. The Airport transfer form will be emailed to you upon receipt of your registration.

### GETTING AROUND THE GOLD COAST

Shuttle Bus - Royal Pines offer a complimentary shuttle service for all AFA guests and partners departing 5 times a day to and from both the Gold Coast and Pacific Fair shopping centre. Book your seat with hotel reception.

Taxis – Call 131 008 for the Gold Coast Regent Taxis Service. Approximate cost of taxi from the airport is between \$60-\$70.

Limousines – All Limousine Transfers offer a 1st class service whether it be a transfer to/from airport or for that special occasion. Contact David on 1800 044 134 or visit his website [www.alllimousinetransfers.com](http://www.alllimousinetransfers.com)

## General Information

### HEALTH CLUB

Access to the Royal Pines Health Club is free to all delegates, their partners and families staying at the resort. Aerobics and Pilates classes are available for all guests including use of the Pool, Spa, Steam and Sauna for all guests. ANGSANA SPA - Designed to be a sanctuary for the inner self, to refresh and rejuvenate your spirit as well as your physical being. Try their \$99 special (1hr massage and ½ hr facial). Book direct on +61 7 5597 8446.

### CAR PARKING

The resort has available complimentary undercover parking for all guests attending the conference. Valet assisted parking is also available on arrival for \$8.00 per vehicle per day for guests attending the conference.

### BREAKFAST

Your room rates do NOT include a breakfast. For those of you not attending any of the breakfast workshops, breakfast is available for all AFA delegates and their families at a special negotiated AFA Conference price of \$20.00 for a Full Buffet breakfast in Parkview restaurant.

### REGISTRATION DESK

The registration desk will be located on the ground floor of the RACV Royal Pines Resort at the entrance to the Trade Exhibition from 9.30am on Sunday October 4th and from 8.00am – 5.00pm daily for the duration of the conference.

### BUSINESS CENTRE

A special area has been designated as an internet café amongst the exhibition booths – Royal Pines Resort reception are able to provide a photocopying and faxing service at a cost and your AFA Conference registration desk will provide a notice board for all incoming messages.

### DRESS CODES

Conference Attire: Smart casual. Pool side Welcome BBQ: BBQ attire  
Dinner: Black Tie

### GROUP BOOKINGS – 5% DISCOUNT ELIGIBILITY

- A minimum of 5 registrations must be received at one time from the same company
- Payment must be made by a single Cheque or credit card
- Full payment of the Registration Fees must be submitted with the Registration Form

# REGISTRATION

form & tax invoice ABN 2900 8619 921

Register online and WIN a bottle of Tasmanian Pinot visit conference website at: [www.afa.asn.au](http://www.afa.asn.au)

**Privacy and Delegate Policy:** In registering for this 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 conference including the AFA, Conference Plus, venue and accommodation providers (for the purpose of room bookings and 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

## SECTION A: DELEGATE INFORMATION

Title..... Surname.....  
 Given Name.....  
 Position.....  
 Company/Organisation.....  
 Address.....  
 City..... State..... P/code.....  
 Phone..... Fax.....  
 E-mail.....  
 Membership Number.....  
 Dietary Requirements.....  
 Other: eg Wheelchair access.....  
 Preferred name for name badge.....  
 Accompanying Partners Name.....

## SECTION B: REGISTRATION FEES

### Full Registration Fee includes: \*

Conference Workbook, satchel, admission to all conference sessions, all morning/afternoon teas and all lunches, Welcome function, AFA Service Awards Cocktail Party and Gala Dinner.

### Group Registrations

- 5 members from the same company earn a 5% discount off full registration fees.
- A minimum of 5 registrations must be received at one time from the same company
  - Payment must be made by a single Company Cheque or credit card
  - Full payment of the Registration Fees must be submitted with the Registration Form

### Day registration fee includes:

Conference Proceedings and satchel, admission to conference sessions, morning/afternoon tea & lunch on the day of attendance.

### Partners registration fee includes:

Lunch on Sunday, attendance to opening/closing ceremonies and their immediate morning/afternoon teas, Official Welcome, AFA Cocktail Party and Official Gala Dinner.

### Early Bird Registration from 15 April - 30 June 2009

Members Full Registration *	\$1,150.00	= \$.....
<b>(READ CAREFULLY FULL LIST OF INCLUSIONS ABOVE)</b>		
Non Members Full Registration	\$1,300.00	= \$.....
AFA Membership PLUS Registration Package	\$1,450.00	= \$.....
Group Registrations 5 members @ 5% discount		= \$.....
Day Registration: <b>Sunday - Monday - Tuesday</b> \$475.00 per day		= \$.....
<i>(Please circle your selection)</i>		
The Leadership Masterclass with Peter Baines	\$120.00	= \$.....
Partners Program Registration	\$700.00	= \$.....

## WHERE TO GET MORE INFORMATION AND KEY DATES

\*\*\* REGISTER EARLY & SAVE \*\*\*

Early Bird Offer Valid ONLY between 15 April, 2009 - 30 June, 2009.

**REGISTER ONLINE NOW: [www.afa.asn.au](http://www.afa.asn.au)**

## TO REGISTER CONTACT CONFERENCE SECRETARIAT

**Conference Plus:** Ground Floor, 369 Royal Pde Parkville 3052  
 Phone: 03 9330 2813 Fax: 03 9310 3643 Mobile: 0407 320 852  
 Freecall 1300 558 397 Email: [Luba.Richards@conferenceplus.com.au](mailto:Luba.Richards@conferenceplus.com.au)

## FOR MEMBERSHIP INFORMATION CONTACT THE AFA OFFICE

Janelle: (02) 9267 4003 [janelle.saunders@afa.asn.au](mailto:janelle.saunders@afa.asn.au) Fax: (02) 9267 5003  
 MEMBER FREECALL: 1800 656 009  
 Office Address: Level 6, 447 Kent Street, Sydney NSW 2000

## Registration after 30 June 2009

Members Full Registration *	\$1,275.00	= \$.....
<b>(READ CAREFULLY FULL LIST OF INCLUSIONS)</b>		
Non Members Full Registration	\$1,500.00	= \$.....
AFA Membership PLUS Registration Package	\$1,550.00	= \$.....
Group Registrations 5 members @ 5% discount		= \$.....
Day Registration: <b>Sunday - Monday - Tuesday</b> \$550.00 per day		= \$.....
<i>(Please circle your selection)</i>		
The Leadership Masterclass with Peter Baines	\$145.00	= \$.....
Partners Program Registration	\$900.00	= \$.....
<b>Total Section B</b>		= \$.....

## SECTION C: SOCIAL FUNCTIONS & ACTIVITIES

The Official Welcome function and Gala Dinner are included in the Delegate and Partners Program Registration fee. Additional tickets may be purchased here.

ALL OTHER SOCIAL FUNCTIONS AND WORKSHOPS ARE OPTIONAL

### Early Bird Social Function Prices until 30 June 2009

GenXt Beach Olympics	\$60.00	= \$.....
AFA Charity Golf Tournament <i>(Club Hire see below)</i>	\$110.00	= \$.....
Official Welcome function	\$90.00	= \$.....
Official Gala Dinner	\$145.00	= \$.....

### Social Function Prices after 30 June 2009

GenXt Beach Olympics	\$60.00	= \$.....
AFA Charity Golf Tournament <i>(Club Hire see below)</i>	\$130.00	= \$.....
Official Welcome function	\$100.00	= \$.....
Official Gala Dinner	\$160.00	= \$.....
GenXt Idol attendance		YES <input type="checkbox"/> NO <input type="checkbox"/>

**GOLF CLUB HIRE** R  L  *(PLEASE TICK)* \$45.00 = \$.....

**Total Section C** = \$.....

## SECTION D: BREAKFAST WORKSHOPS

### Early Bird Breakfasts until 30 June 2009

GenXt Breakfast Monday 5 Oct	\$ 45.00 x No.....	= \$.....
MDRT Breakfast Monday 5 Oct	\$ 45.00 x No.....	= \$.....
NAB Best Practise Breakfast Tuesday 6 Oct	\$ 45.00 x No.....	= \$.....
Business Insurance Breakfast Tues 6 Oct	\$ 45.00 x No.....	= \$.....

### Workshop prices after 30 June 2009

GenXt Breakfast Monday 5 Oct	\$ 55.00 x No.....	= \$.....
MDRT Breakfast Monday 5 Oct	\$ 55.00 x No.....	= \$.....
NAB Best Practise Breakfast Tuesday 6 Oct	\$ 55.00 x No.....	= \$.....
Business Insurance Breakfast Tues 6 Oct	\$ 55.00 x No.....	= \$.....

**Total Section D** = \$.....

# REGISTRATION

## form & tax invoice cont.



### SECTION E: ACCOMMODATION

Accommodation has been 'block booked' by Conference-Plus to ensure availability and to provide an efficient and convenient reservation service. Bookings for your accommodation **MUST** be made through Conference Plus. The hotel will not accept direct bookings.

#### ROOM TYPE - PLEASE TICK

Single  Double/Twin  Suite   
 Smoking  Non Smoking

Check in date..... Check out date.....

Arrival Time..... Departure Time.....

I have arranged to Twin share with .....

**RACV Membership Number:** .....  
 appropriate rates will apply

**Total Section F Accommodation deposit** = \$.....

CHEQUE deposit equivalent to one rooming night is required to secure your accommodation and must accompany this registration. To be received at the latest 30 days prior to the commencement of the conference.

ALTERNATIVELY your credit card details are sufficient to confirm and secure your accommodation booking. SEE PAYMENT METHODS.

### PAYMENT SUMMARY

Section B: Total Registration Fees	\$.....
Section C: Total Social Functions	\$.....
Section D: Total Workshops	\$.....
Section E: Total Accommodation DEPOSIT/PREPAYMENT	\$.....
<b>TOTAL FEES ENCLOSED (GST inclusive)</b> =	\$.....

All fees are inclusive of GST and by registering on-line you will be issued with a Tax Invoice. All fees are quoted in Australian Dollars (AUD) and are inclusive of 1/11th GST.

### PAYMENT METHODS

#### Credit Card Payment

Visa  Mastercard  Bankcard  Amex

Card Number

Expiry Date...../.....

Name on Card.....

I agree for my credit card details as shown to be debited to the value of \$..... for my registration and for my credit card details to be forwarded to the hotel of my choice to secure my accommodation.

Signature.....

#### CHEQUE PAYMENT: Made payable to: "AFA Ltd 2009 Conference"

Forward cheques to Conference Secretariat:

Cheque number ..... Amount: \$.....

Please indicate which form of correspondence you prefer:

Email  Mail  Facsimile

#### EARLY BIRD REGISTRATION FEE

To validate your Early Bird Registration discount, payment must be made prior to June 30 2009.

**Cancellation Policy:** A refund of registration fees, less an administration charge of \$150.00 (including GST) will only be available providing written notification if your cancellation is received prior to September 2, 2009. No refunds after this date. Substitutions may be made at any time.

#### Liability Disclaimer

The event organisers, its agents and servants do not accept any liability for errors or omissions, which may appear in this brochure. To the best of its knowledge the comments were correct at the time of printing. The event organizer or their principle reserves the right to amend any part of the program without notice. Such amendments may include substitution or cancellation of speakers, social functions or tours. The event organizer accepts no responsibility for the accuracy or content of any statement whether written or orally made by speakers in connection with the event.

#### Where did you hear about the AFA National Conference?

Brochure in mail       AFA email message  
 AFA Magazine       AFA Website  
 Word of mouth      Other (specify) .....

#### What is your age range?

20-30    30-40    40-50    50-60    Over 60

#### Have you attended the AFA National Conference before?

Yes (Year ).....    No

