

GenXt 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 PRICE FOR VALUE MASTERCLASS
 > FChFP WORKSHOP MASTERCLASS

NATIONAL SPONSORS

PLATINUM



GOLD



EVENT SPONSORS



MEDIA PARTNER



INVITATION TO

AFA GenXt **KICKSTART** ROADSHOW 2010

Purpose

- Kickstart GenXt for 2010.
- Key issues facing GenXt in the area's of:
 - building your business
 - choosing the right business model
 - market overview
 - setting the right price
 - client engagement and advice skills
- Bring people together to learn, connect, share & enjoy.
- Partner trade opportunities.

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

YOUR GenXt TEAM



BRAD FOX



ADAM SMITH



NATHAN MORGAN



SARAH RIEGELHUTH



PAUL BANNER



DAVE SLOVINEC



MICHAEL NOWAK



ROB SCHILIRO



SARAH RYAN



SARAH WOOD

AGENDA

- 7.30 am** Register
- 7.45 am** Open & Welcome
- 7.55 am** The AFA SOS Mentoring program 
- 8.00 am** **Session 1**
"Investment markets.....what to look out for in 2010"
William Tomac - General Manager Global Value Investors
- 8.35 am** **Session 2**
"Life After Ripoll.....what does it mean to your business?"
Richard Klipin - AFA Chief Executive Officer
- 9.00 am** **Session 2a**
"Going back to school.....raising the bar on adviser education"
Jim Taggart - AFA National President
Mark Sinclair - CEO Mentor Education Group
- 9.30 am** **Session 3**
"Price for Value.....building the right pricing model for your business"
Graham Peatey - CEO Encore Group
- 10.05 am** **Morning tea / Sponsor Expo**
- 10.40 am** **Session 4**
"How I built a fee based business and why my clients love it"
Errol Woodbury - Woodbury Financial Services
- 11.15 am** **Session 5**
"2010 the year of change"
Adviser panel with AFA members
- 12.00 pm** Close and finish

* Please note: Hobart program 12.00pm - 4.30pm

* Please note: No Masterclasses in Hobart

NEW FOR 2010 MASTERCLASSES

- 12.45 pm to 3.30 pm** **Masterclass 1 - Practice Management**
"The price for value.....under the bonnet of your business in 2010"
Graham Peatey - CEO Encore Group
Errol Woodbury - Woodbury Financial Services
- 12.45 pm to 4.30 pm** **Masterclass 2 - Education**
"FCHFP Transition Workshop"
Dr. Mark Sinclair - CEO Mentor Education Group

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WILLIAM TOMAC General Manager - GVI

William Tomac has over 15 years experience in the financial services industry. Previously, William was the Research and General Manager of Lifespan Financial Planning Pty Limited, an independently owned licensee with advisers across Australia. In addition, his experience includes being the General Manager of the Omniport Wrap Service. As General Manager, William's background and experience provides Global Value Investors Ltd with the appropriate knowledge and understanding of funds management, assessing fund manager processes and operations, compliance and administration platforms.



MR. GRAHAM PEATEY - Managing Director Encore Group

Graham Peatey is a founding partner and managing director of The Encore Group – an independent business management consulting firm working with a broad cross section of financial services practices, dealer groups and institutions. In the relatively short time that the Encore Group has been established it already has the reputation as being the premier Practice Management group in Australia, working with many of the large institutions and National Dealer Groups.



ERROL WOODBURY - Director Woodbury FS

Errol Woodbury is the Principal and founder of Woodbury Financial Services, a boutique Financial Advisory firm located in Sydney. Woodbury Financial Services commenced operations in 1985 and specialises in building, maintaining and protecting the wealth of senior executives and other high net worth individuals and their families. Errol has a Diploma in Financial Planning, is a Certified Financial Planner (CFP), and is a long serving member of the Australian industry body (FPA).



DR. MARK SINCLAIR - CEO Mentor Education Group

Mark is the Managing Director of the Mentor Education Group, including RG146 Training Australia, FutureStaff and AdviserLink. During his career, Mark has worked as a corporate advisor with AT Kearney and KPMG, and has three years experience tutoring to the MBA program at RMIT University.



JIM TAGGART AFA National President

Jim is Managing Director of two independent financial services licensees, holds CFP status in the financial advising services and QPIB status for general insurance services. Jim's businesses provide services predominately in Western Sydney. Prior to commencing his financial services career in 1987, Jim was a teacher in the Catholic Education system in varied teaching roles including Deputy Principal.



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 GENXT ROADSHOW

Tuesday 2nd February 2010

Burswood

Astral Room 3 & Foyer

7.30am - 12.00pm

Masterclass 1 - 12.45pm - 3.30pm

Masterclass 2 - 12.45pm - 4.30pm

ADELAIDE GENXT ROADSHOW

Wednesday 3rd February 2010

Adelaide Pavilion

7.30am - 12.00pm

Masterclass 1 - 12.45pm - 3.30pm

Masterclass 2 - 12.45pm - 4.30pm

HOBART GENXT ROADSHOW

Thursday 4th February 2010

Wrest Point Hobart

12.00pm - 4.30pm

MELBOURNE GENXT ROADSHOW

Tuesday 9th February 2010

Hilton on the Park

7.30am - 12.00pm

Masterclass 1 - 12.45pm - 3.30pm

Masterclass 2 - 12.45pm - 4.30pm

SYDNEY GENXT ROADSHOW

Wednesday 10th February 2010

Doltone House

7.30am - 12.00pm

Masterclass 1 - 12.45pm - 3.30pm

Masterclass 2 - 12.45pm - 4.30pm

BRISBANE GENXT ROADSHOW

Thursday 11th February 2010

Sofitel

7.30am - 12.00pm

Masterclass 1 - 12.45pm - 3.30pm

Masterclass 2 - 12.45pm - 4.30pm

NOTE: This program may differ slightly.

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

Masterclass 1: The price for value under the bonnet of your business in 2010

**The Financial Adviser industry is set for major change in 2010 & beyond.
The winds of change are already sweeping through the market.**

This session with Errol & Graham will explore the following key issues:

- ✓ How to build your value proposition.
- ✓ How to price your offer.
- ✓ How to grow the EBIT multiple of your business.
- ✓ How to get in control of your cash flow.
- ✓ How to confidently talk to your clients about your value.
- ✓ How to position your offer to clients.
- ✓ How to build a business with clients you want to work with.
- ✓ Practical insights & case studies from both Errol & Graham.



Graham Peatey
CEO Encore Group



Errol Woodbury
Director Woodbury FS

THIS SESSION IS NOT TO BE MISSED

Masterclass 2: FChFP Transition Workshop

Dr. Mark Sinclair CEO Mentor Education Group



In the context of the Ripoll enquiry and a clear momentum to raise education standards, the AFA is taking a leadership role on education.

The Fellow Chartered Financial Practitioner (FChFP) Program embodies the AFA's vision of lifelong learning and education, designed to provide advisers with the opportunity to develop specialist knowledge and expertise to confidently move to the next level of their careers.

To find out more, stay on for lunch after the GenXt Roadshow or if you are ready to enrol in to either the FChFP Program (4 modules) or the Bridging course to the FChFP (2 modules), you can stay on after lunch to sit two exams in the afternoon.

Advisers who would like to find out more about the AFA's Executive FChFP Program or the Bridging course to the FChFP should stay on after the GenXt Roadshow.

Exams (1.15 pm – 4.30 pm)

Advisers who are looking to complete the FChFP Bridging Program, can obtain the FChFP designation by successfully completing the challenge test (exam) for 2 of the 4 modules and submitting the two related assignments.

If you are interested in enrolling in the Bridging course to the FChFP and sitting for these Challenge Tests (exams) immediately after the GenXt Roadshow.

RSVP

To reserve your place, please complete the form below.

TIME	PROGRAM	MODULE
12.15pm	Lunch	FChFP Program presentation / orientation
1.00pm	FChFP Bridging Exam (1 of 2)	AFA 2 – Client Engagement & Advice
3.00pm	FChFP Bridging Exam (2 of 2)	AFA 4 – Managing an Advice Business'

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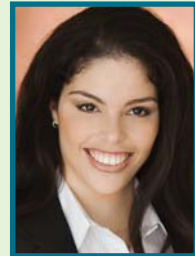
AFA Member Testimonials

86% of last years attendees found the Forum 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

“

This is the first AFA function I have attended and it was very impressive
Claudia Viera



Talk about enthusiasm - congratulations, look forward to the 2010 program.
Chris Browne



The Roadshow was awesome and very relevant for my business.
Sarah Riegelhuth

”

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 GenXt **KICKSTART** ROADSHOW 2010

- GenXt Roadshow Only
 Masterclass 1 Only
 GenXt Roadshow and Masterclass 1 Package (Graham & Errol)
 Masterclass 2 Only
 GenXt Roadshow and Masterclass 2 Package (Dr. Mark Sinclair)

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 CONT.

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5. COST

\$75 AFA Members - \$95 Non AFA Members. (includes gst) • **Includes: Hot Breakfast & Morning tea for all sessions.**

Tables of 10 for AFA sponsors & members @ \$750 (includes gst)

Tables of 10 for AFA non members @ \$950 (includes gst)

Masterclass 1 & 2 - \$50 AFA Members - \$70 Non AFA Members. (includes gst) • **Includes: Lunch**

PACKAGE DEAL

Roadshow plus Masterclass \$115 AFA Members - \$150 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.