

INVITATION TO



LIFE COMPANY OF THE YEAR 2013

Wednesday 12 March 2014
BLACK TIE DINNER

7.30pm - 11.30pm
The Westin, 159 Pitt Street, Sydney, NSW. Sydney

WHAT ARE THE AWARDS?

These Awards recognise excellence in the provision of Life & Annuity products and services to financial advisers and their clients.

LIFE COMPANY OF THE YEAR 2013 INCORPORATING:

- Platinum Award
- Life Company Product & Service Quality Awards
- Annuity Provider of the Year
- Investment Bond of the Year
- Product innovation awards

CLIENT SERVICE AWARDS:

- Underwriting Team of the Year
- Claims Management Team of the Year
- Business Development Team of the Year

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**FINANCIAL
STANDARD.**

Life Company of the Year 2013

You are invited to the Plan for Life / AFA Life Company of the Year 2013 Awards, incorporating Life Company Product & Service Quality Awards and Annuity Provider of the Year, insurance bond of the year and Team service awards. This will be a Black Tie dinner held in the award winning Westin Hotel in the Sydney CBD, with special guest speaker Phil Waugh.

Wednesday 12 March

Location:

The Westin, 159 Pitt Street,
Sydney, NSW,
2000

Time:

7.30pm - 11.30pm

[REGISTER HERE](#)

Agenda

Arrive & Drinks

Welcome & Dinner

Special guest speaker Phil
Waugh

Awards Ceremony Commences

Coffee & Dessert

Prices

\$285 per person

Tables of 10 @ \$2,750

(All costs stated above are
GST inclusive)

To register, visit the AFA
Website

www.afa.asn.au/events

Award Categories

Risk Insurance:

- Platinum
- Service Quality
- Term/ TPD
- Trauma
- Income Protection
- Risk Product Innovation

Investment Bond

- Investment Bond of the year

Annuity and Income Stream

- Overall Annuity Provider of the year
- Long Term Income Stream
- Annuity & Income Stream
- Product Innovation award

Service Awards

- Underwriting and New Business Team of the Year
- Claims Team of the Year
- Business Services/BDM Team of the Year

Special guest speaker



PHIL WAUGH

From 1999 through until the end of 2011, Phil Waugh was a professional rugby player contracted with the New South Wales Rugby Union and the Australian Rugby Union. During this time he earned 79 Australian caps (3 as captain) with the Wallabies and 136 caps (58 as captain) with the New South Wales Waratahs.

He has also completed two Masters Degrees (Masters of Commerce and Masters of International Business, focusing on Strategic Management) at The University of Sydney during his playing career. He is a Non-Executive Director on the Pacific Restaurant Group Board. To compliment this directorship he is a Graduate of the Australian Institute of Company Directors.

Other investment interests include the Australian Stock Market and the Sydney property market where he is endeavouring to grow a diversified portfolio.

Since retiring from rugby, he is employed as an Executive Manager at CBA within the Business and Private Bank Business Unit.

Judging Process

To ensure rigour, fairness and transparency in the awards process the assessment for the Life Company of the Year Awards is completed in two parts:

Part 1: The Product Awards. These are based on data provided by participating companies to Plan For Life on a quarterly basis, combined with service quality input.

Part 2: The Service Quality Award. This has been conducted via a web based survey of AFA members, Plan For Life client dealer groups and the broader adviser community.

Part 3: Service Team Awards. Advisers were asked to rate the performance of up to three life companies they had used most in the last 12 months across the three Service Team Awards. This resulted in over 2,000 performance ratings which were used to determine the winners and finalists for each Service Team Award.

Partners

The AFA would like to thank and recognise the following companies for their support (JANUARY 2014)

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