INVITATION TO

FUTURE OF FINANCIAL ADVICE

TIME TO TRANSITION, LET'S SHOW YOU HOW

- Real People, Real Solutions
- Is your business in shape to implement FoFA
- What does FoFA mean to your business?
- Are you Opt In ready?
- Have you moved to a fee for service model?
- Can you articulate the value of your advice proposition?
- Do you really know where your client revenue comes from?
- Come and hear what the passing of the legislation will mean to your business

Listen to 4 panellists who have transitioned their businesses to a fee for service model, they will share their own experience and identify the challenges and opportunities.

Guest Speaker
Phil Anderson

Guest Speaker
Matt Englund

Event Sponsors

BT

OnePath
a company of ANZ

genXt
The Future of Advice

Date
Wednesday 6 June 2012

Time
7.15am – 9.30am

Venue
Adelaide Pavillion
on the Park
Cnr South Terrace &
Peacock Road
Adelaide SA 5000

Closing Date
Friday 1 June 2012

Cost
AFA Members $30
Non AFA Members $35

afa
Association of
Financial Advisers

FoFA - Time To Transition, Let's Show You How

Agenda

7.15am Registration

7.30am David Sutherland State AFA Director & MC

7.35am Guest Speaker | Phil Anderson, AFA COO
FoFA and where the AFA is focused

8.00am Guest Speaker | Matt Englund, BT Financial Group
Focusing on FoFA from a Dealer Groups perspective

8.25am Adviser Panel Discussion | Hosted by Vilma Attanasio
Hear from Key Practices who are leading the way & shaping the Future of Financial Advice

9.10am Open Forum | Questions to Adviser Panel and Guest speakers

9.30am Finish

Guest Speakers

PHIL ANDERSON

Chief Operating Officer, Association of Financial Advisers Ltd

Phil Anderson is the Chief Operating Officer with the Association of Financial Advisers. Phil joined the AFA in August 2011 having previously been with Colonial First State, where he was the Head of Risk Management & Compliance for the CFS Advice business.

Phil has been in the financial services industry for 17 years, having also worked with AMP, MLC and Perpetual. Phil has worked closely with the advice businesses at both CFS and MLC. At MLC, Phil was the Head of Risk & Compliance for the Financial Planning businesses.

At the AFA, Phil has responsibility for Policy, membership services, administration, finance and board support. Phil has been integrally involved in the development of submissions to Treasury, the PJC and Senate Economics committee on FoFA and MySuper.

Phil is a CPA and has a Bachelor and Masters of Commerce along with the Diploma of Financial Services.

MATT ENGLUND

Head of Dealer Groups, BT Financial Group

Matt Englund is the Head of Dealer Groups for BT Financial Group. Previous to this Matt, was the Head of Practice Management since December 2008, following the merger of St George and Westpac. Matt moved in to this role from Asgard Wealth Solutions, which he joined in early 2008 as the Northern Region Area Manager, responsible for leading and managing sales teams and operations across two states.

Prior to that, Matt spent 9 years with Colonial First State, where he held several senior management roles, including Head of Advice Solutions and Head of Distribution Development. Matt holds a Bachelor of Business (UTS) and a Graduate Diploma in Financial Planning (SIA).

Panel

MICHAEL SMITH
Garvan FP

JOHN GROCKE
Securitor

THEO MARINIS
Marinis Group

BRETT SCHATTO
RI Advice Group

FoFA - Time To Transition, Let's Show You How

Event Date: Wednesday 6 June 2012 | Closing Date: Friday 1 June 2012

Please fax all registration forms to: (02) 9267 5003

1. Personal Details

Title: ____ Name: ____

Surname: ____ AFA Membership Number: ____

2. Contact Details

Licensee: ____

Company: ____

Mailing Address: ____

City: ____ State: ____ Postcode: ____

Phone: ____ Fax: ____

Mobile: ____ Email: ____

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

3. Number of people attending? (please provide name & email)

1.	☐ AFA Member	☐ Non Member
2.	☐ AFA Member	☐ Non Member
3.	☐ AFA Member	☐ Non Member
4.	☐ AFA Member	☐ Non Member
5.	☐ AFA Member	☐ Non Member
6.	☐ AFA Member	☐ Non Member
7.	☐ AFA Member	☐ Non Member
8.	☐ AFA Member	☐ Non Member
9.	☐ AFA Member	☐ Non Member
10.	☐ AFA Member	☐ Non Member

FoFA - Time To Transition, Let's Show You How

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4. Cost

☐ AFA Members $30

☐ Non AFA Members $35

All costs stated above are GST inclusive.

5. Payment Details

Please charge $ ________ **(gst incl)** to my (please tick) 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 082-330 A/C No. - 028 57 3951

For EFT payments please provide the date of the event your are attending and your name as a reference.

Ref (date of event): / Surname:

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.

Please send or fax all registration forms to:

AFA National Office
PO Box Q279, Queen Victoria Building NSW 1230
Ph: (02) 9267 4003 | **Fax:** (02) 9267 5003

Melissa Favaloro
Email: melissa.favaloro@afa.asn.au

Amy Jones
Email: amy.jones@afa.asn.au

All registrations will be confirmed by email. A receipted tax invoice will be emailed to the address on your registration form.