

INVITATION TO **GENXT** NATIONAL **ROADSHOW**

TWENTY
12

Pathways to excellence

education + insight + consumers

GET THERE
genxt
The Future of Advice

NEW FOR 2012 MASTERCLASSES

Inspiration

*"Grow your personal brand and
take the world by storm"*

Samantha Gash, Ultramarathon runner
Sarah Riegelhuth, GenXt National Chair

Practice Management

A new innovation for Practice
Development Managers, Paraplanners
and Support Staff

PACKAGE DEAL

Roadshow plus Masterclass

AFA Members \$150 | Non AFA Members \$180

EVENT SPONSORS

evolve logic

Premium Funds  China Management

 **afa**
Association of
Financial Advisers

Welcome and Introduction



SARAH RIEGELHUTH

Get Noticed	Gain industry and media recognition
Get Inspired	Develop new ways of thinking
Get Connected	Acquire national and online networks
Get Mentored	Enter structured mentor programs
Get Smart	Grow with the education opportunities

The GenXt Team have affirmed their goals and objectives for 2012 and are looking forward to sharing these with you.

GenXt is the pathway to excellence for young financial professionals. GenXt an initiative of the AFA, aims to encourage young financial professionals to strive towards high levels of advisory skills and knowledge and building long lasting professional connections.

Operating as a national network of young volunteers, GenXt is based firmly

on a philosophy of ensuring a strong **Future of Advice.**

Do you thirst for knowledge, self-improvement and desire to be one of the best in your profession? Then become a GenXt member today.

Highlights for 2012

At the 2012 GenXt National Roadshow you can:

Get inspired

Hear from Samantha Gash a high achiever with a thirst for experience, adventure and the thrill of life

Get smart

Learn from Jonathan Wu about the shifting paradigm of investing in Asia

Get connected

Become an expert in practice efficiency – execution and implementation

Plus 2012 Masterclasses

Masterclass 1

INSPIRATION

"Grow your personal brand and take the world by storm"

SAMANTHA GASH,
ULTRAMARATHON RUNNER

SARAH RIEGELHUTH,
GENXT NATIONAL CHAIR



SAMANTHA GASH



SARAH RIEGELHUTH





7.30am	Registration	
7.45am	Open and welcome	
8.00am	Session 1 <i>"The pathway to excellence, an AFA perspective"</i> Richard Klipin, AFA	
8.30am	Session 2 <i>"Building a professional pathway for excellence in education"</i> Finn Kelly, Wealth Enhancers Nick Hakes, Campus AFA	
9.00am	Session 3 <i>"The challenge of endurance - both in life and as an athlete"</i> Samantha Gash	
9.35am	AFA Foundation	
9.55am	Morning Tea	
10.30am	Session 4 <i>"How long will the Chinese Dragon Roar"</i> Jonathan Wu, Premium China Funds Simon Wu, Premium China Funds	
11.05am	Session 5 <i>"Fast-tracking your confidence with clients"</i> Sarah Riegelhuth, Wealth Enhancers	
11.40am	Session 6 <i>"Practice efficiency is the key to success long term"</i> Andrew Rawlinson, Stephen Bell Evolve Logic	
12.10pm	Close	

When and Where?

Hobart GenXt Event

Tuesday 31 January 2012
 Wrest Point Hotel,
 410 Sandy Bay Road, Sandy Bay
 Wellington Room
9.30am – 2.00pm

***Please note start time**

Adelaide GenXt Event

Wednesday 1 February 2012
 Hilton Adelaide Hotel,
 233 Victoria Square
 Ballroom
 7.30am – 12.00pm

Perth GenXt Event

Thursday 2 February 2012
 Pan Pacific Hotel,
 207 Adelaide Terrace
 Golden Ballroom
 7.30am – 12.00pm

Melbourne GenXt Event

Tuesday 7 February 2012
 Melbourne Arts Centre,
 100 St Kilda Road
 ANZ Pavillion
 7.30am – 12.00pm

Sydney GenXt Event

Wednesday 8 February
 Doltone House,
 Jones Bay Wharf, Pyrmont
 South Pier
 7.30am – 12.00pm

Brisbane GenXt Event

Thursday 9 February
 Sebel Hotel,
 King George Square,
 Cnr Ann and Roma Streets
 Presidential Ballroom
 7.30am – 12.00pm

Masterclass 1 12.45 – 3.00pm

Masterclass 2 12.45 – 3.00pm

Parking

There is ample parking available at all venues.

Up to 8 CPD points will be available



SAMANTHA GASH

In her final years as a Melbourne law student Samantha decided to challenge the limits of her physical and mental endurance. She sought to become the first woman and youngest competitor ever to complete what TIME magazine has described as one of the world's Top 10 endurance competitions. Four, 250km ultra-marathons in the driest, hottest, windiest and coldest deserts. Every element of this goal placed Samantha outside of her comfort zone and she faced a series of setbacks, which may have questioned many people's motivations and ability to continue.



SARAH RIEGELHUTH, DIRECTOR, WEALTH ENHANCERS

Sarah is co-founder of Wealth Enhancers, a boutique private wealth management firm that provides highly tailored solutions to a select range of professional and SME clients. Distinguished as a finalist of the AFA Rising Star Award in 2008 and 2009, Sarah was recognised for her excellence in holistic financial advice, commitment to education and contribution to the profession and the broader community. In 2011, Sarah was appointed to the AFA Board, the youngest in the association's history.



FINN KELLY, CEO, WEALTH ENHANCERS

Finn's military training helped him develop a broad range of skills and taught him how to seize key opportunities, while managing risk to optimise performance and maximise success. Finn is committed to ongoing education and his formal qualifications include a Bachelor of Science, a Diploma of Financial Services, a Graduate Diploma of Education, a Diploma of Government, and a Diploma of Management. He believes that education is the key to success in any aspect of life.



STEPHEN BELL, FOUNDER/DIRECTOR, EVOLVE LOGIC

As a Director and Principal Financial Strategist Stephen has achieved great respect within the industry for being strategic, innovative and solutions driven. His priority is to ensure that his solutions meet the individual goals of his clients, while working within the parameters of the ever changing financial legislation. His insight and understanding of industry fundamentals and his extensive knowledge in strategic financial planning ensures he tailors a strategy to a clients specific goal every time.



NICK HAKES, NATIONAL DISTRIBUTION MANAGER, CAMPUS AFA

Nick Hakes has a dual role in designing, building and implementing Campus AFA – an interactive hub for the AFA's education solutions; and National Distribution for Mentor Education Group. Nick works with licensees and advisers to promote the continual investment in leadership education for the financial services profession. Nick believes education should be both formal and practical in nature and will ultimately encourage more consumers to seek financial advice - good advice is good business.



ANDREW RAWLINSON, CHAIRMAN OF THE BOARD, EVOLVE LOGIC

Andrew's key industry experience has been obtained through building and providing portfolio administration services to financial advisers. Andrew has developed skills in B2B and then B2C positioning of technology solutions, which too often are delivered via IT people into a non savvy IT market place. Andrew is a big advocate of the Edward Debono way of thinking, outside the square, innovative and creative.



JONATHAN WU (TOP), HEAD OF DISTRIBUTION AND OPERATIONS, PREMIUM CHINA FUNDS



SIMON WU (BOTTOM), EXECUTIVE CHAIRMAN, CHIEF INVESTMENT STRATEGIST, PREMIUM CHINA FUNDS

Jonathan and Simon are seasoned professionals in investing in Asia and have an indepth understanding of the current issues that are occurring in the fastest growing region in the world. Their business Premium China Funds, a boutique funds management group, is the largest China equities fund in Australia.



RICHARD KLIPIN, AFA, CHIEF EXECUTIVE OFFICER

As CEO of the AFA, Richard is focused on building and repositioning the AFA to be a contemporary and relevant national body representing Advisers in the industry. He has been successful in building the brand and profile of the AFA with Government, media and the broader community to provide a united voice for all financial advisers and their clients. Richard has an MBA and a BA Dip Ed from Macquarie University.



Masterclass 1

INSPIRATION

"Grow your personal brand and take the world by storm"

Two high achievers, Samantha Gash and Sarah Riegelhuth, share their experiences of building personal brands, getting noticed and being heard. Both have experienced and survived challenging situations and lived to tell the tale.

This session will give you the confidence to believe in yourself and differentiate yourself from your competitors.



SAMANTHA GASH



SARAH RIEGELHUTH

This program will inspire you to:

- Differentiate yourself from your competitors
- Adapt yourself for success
- Identify your personal brand

Masterclass 2

PRACTICE MANAGEMENT

"How do you become an expert in implementing software"

This session is designed to assist you improve your practice efficiency by looking at operational platforms and specifically the software applications you choose to run. The workshop will examine how you go about implementing software effectively to drive an efficient operational

model. This session will look at the business case around an outsourcing solution and the impact of outsourcing the implementation of software including the importance of an ongoing training and support engagement with the outsource provider.



STEPHEN BELL



ANDREW RAWLINSON

This program is appropriate for:

- Paraplanners
- Aspiring Business Managers
- Practice Development Managers
- Practice Support Staff

Sponsored by

evolvelogic



83% of attendees at the 2011 GenXt Roadshow said that the presentations were of relevance to them.



Snapshots from 2011 Roadshows



Your AFA GenXt Team



National



**SARAH
RIEGELHUTH**



**DAVID
PETTIT**



**CHRIS
BROWNE**



**MICHAEL
NOWAK**



**AMMIE
KOMEL**



**NATIONAL SOS
CHRIS JONES**

States



**VIC
STEVE CRAWFORD**



**NSW
JO BRASSETT**



**QLD
FRASER JACK**



**SA
DAVE SLOVINEC**



**WA
DAVID PETTIT**



**TAS
ROB SCHILIRO**

National Sponsors

Platinum



With you



a company of ANZ



Gold



redefining /
financial services



Licensee Partners

Diamond



Family of brands



Family of brands





PACKAGE DEAL

Roadshow plus Masterclass AFA Members \$150 | Non AFA Members \$180

1. Personal Details

Title:	<input type="text"/>	Name:	<input type="text"/>
Surname:	<input type="text"/>	AFA Membership Number:	<input type="text"/>

2. Contact Details

Licensee:	<input type="text"/>		
Company:	<input type="text"/>		
Mailing Address:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text"/>
Phone:	<input type="text"/>	Fax:	<input type="text"/>
Mobile:	<input type="text"/>	Email:	<input type="text"/>
Special Requirements (e.g. access, dietary, other):	<input type="text"/>		

3. Which State will you be attending? (please tick box)

<input type="checkbox"/> SA	<input type="checkbox"/> NSW	<input type="checkbox"/> VIC	<input type="checkbox"/> WA	<input type="checkbox"/> QLD	<input type="checkbox"/> TAS
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4. Number of people attending? (please provide name & email)

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

Registration AFA GenXt Roadshow 2012



5. Cost

GenXt Roadshow 2012 only – Includes Hot Breakfast and Morning Tea for all sessions.

- ☐ AFA Members \$95 ☐ Non AFA Members \$115
- ☐ Tables of 10 AFA Sponsors and Members @ \$950
- ☐ Tables of 10 for AFA non members @ \$1,150

Package Deal

GenXt Roadshow plus Masterclass 1

- ☐ AFA Members \$150 ☐ Non AFA Members \$180

GenXt Roadshow plus Masterclass 2

- ☐ AFA Members \$150 ☐ Non AFA Members \$180

All costs stated above are GST inclusive.

6. 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 you are attending and your name as a reference.

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.

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

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