

the age of speed... how to operate in the new environment

EARLY BIRD CLOSES 30 JUNE

New for 2010

- AFA Elite Adviser Program
- BDM/PDM Masterclass
- Campus AFA – Transition Program
- GenXt Insurance Bootcamp

UP TO
16 C.E. CREDITS
AVAILABLE

Inspiration

Insight

Leadership

Knowledge



Kurt Fearnley



Anthony Bell



Dr Clark Perry



Julie Bennett



Dr Jim Taggart



Chris Helder



Kerry Chikarovski



Senator Mathias Cormann

From the Chairman



Troy Edmondson
Conference Chair

Building on the huge success of the 2009 National Conference, the AFA is planning an even better conference for 2010. 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.

Main Platform 2010

KEYNOTE

"How to operate in the new environment"



Steve Tucker
Group Executive, MLC

Julie Bennett
64 Media

Andrew Inwood
CEO Brand Management



Richard Klipin
CEO AFA

Christina Kalantzis
Principal Alexis

Peter Daly
CEO AFS

Kerry Chikarovski
Political Strategist

A panel of industry leaders. This industry panel will address a range of key issues facing the advisory profession.

These issues will include:

- Adviser Renumeration Models
- the role of adviser
- the Future of Superannuation & the Ripoll Report
- the Voice of Consumers
- Insurance and savings adequacy in Australia as well as time for questions from the floor.

Meet Julie Bennett and the Panel on the Main Platform at 2pm on Sunday 24 October



Anthony Bell

Managing Director of Bell Partners

"Maintaining the Rage"

How I built Bell Partners from scratch to No.1 in the BRW's most productive accounting Firms"

Heading up one of the country's largest sole partner Accounting firm's, Anthony Bell is best known for his high energy and performance, efficiency and personalised service.

His firm, Bell Partners was featured in Business Review Weekly's "Top 100 Accounting Firms for 2009, noting Bell Partners as the #1 Most Productive Firm for the seventh consecutive year running, which has never been achieved before by any other firm.

Anthony's interactive session will deal with the essential tools required to give your business a leading edge in its growth and prosperity.

Don't miss Anthony Bell at "The Masterclass Breakfast" 7.15am Monday 25 October, "Avoiding the 7 Deadly Sins of Business" & on the Main Platform at 9am on Monday 25 October for "Maintaining the Rage"

Sponsored by



In this Keynote session Anthony will cover:

- the History of firm
- Mistakes made and how to avoid them
- Finding opportunity in disaster
- Maintaining the "rage"
- Discuss the highlights of Sydney to Hobart project

Anthony's Masterclass will cover:

- Top 5 tips to build a brand without spending any money
- Designing a winning team mentality
- Growing leadership from within
- Sales Vs Distribution

Main Platform 2010

Dr Clark Perry

Global Partner of rogenSi

"Creating a Fortius Mindset to Deliver Results in Challenging Times"

Dr Clark Perry is a world leader in elite performance, leadership and team development.

Clark Perry earned his international reputation following enormous success working closely with a wide array of elite athletes, coaches and business leaders, such as the Australian Swimming Team, Australian Cycling, the ARU Wallabies as well as the National Australia Bank, MLC, Toyota and Pfizer.

In his role as Olympic Team Psychologist, Clark Perry has attended four Olympic Games. He has also mentored and worked closely with elite athletes competing in Commonwealth Games, World Championships, Pan Pacific Swimming Championships, and the Super 12 Grand Finals.

In addition to working with elite athletes, he continues to partner with many leading international businesses and sporting teams in his role as Director of Rogen Si.

Don't miss Clark Perry at "The Leadership Masterclass" 8.30am Sunday 24 October & on the Main Platform at 2.40pm on Sunday 24 October for "Creating a Fortius Mindset to Deliver Results in Challenging Times."



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Senator Mathias Cormann

In September 2008 Mathias was appointed Shadow Parliamentary Secretary for Health Administration. He was appointed Shadow Minister for Employment Participation, Apprenticeships and Training in December 2009. In September 2010 Mathias was appointed Shadow Assistant Treasurer and Shadow Minister for Financial Services and Superannuation.



Don't miss Senator Mathias Cormann at on the Main Platform at 4.40pm on Sunday 24 October



Kurt Fearnley

"2009 NSW Young Australian of the Year"

Kurt Fearnley is a world champion wheelchair athlete with a can do attitude that makes the impossible possible. His infectious energy and passion for life inspires and motivates audiences across age groups and industries.

In 2009, Kurt Fearnley claimed his fourth New York Marathon title in a row, finishing the 42.2-kilometre course in a time of one hour, 35 minutes and 58 seconds. Just two weeks before he claimed his third consecutive win in the Chicago Marathon. Kurt moved on from the marathon circuit to take up his next and most grueling challenge for the year – crawling the Kokoda Trail. He took on this last challenge for 2009 to raise awareness of men's health issues.

Kurt Fearnley was born without the lower portion of his spine, yet despite this, he's always been willing to have a go at everything. The youngest of five children from the small western NSW town of Carcoar, sport was always a big part of his family's life. Ignoring his disability, he happily played in everything against his able bodied brothers and mates.

With an indomitable spirit, Kurt took up wheelchair racing when he was 14. From pushing his everyday wheelchair as fast as he could down the grass track at school athletics carnivals to pushing his chair the last five kilometres on a flat tyre at the Athens Paralympics, he went on to win gold in the toughest marathon in Paralympic history. His determination and never-say-die attitude have rewarded him with the highest accolades in disability sport.



Sponsored by



Don't miss Kurt Fearnley on the Main Platform telling his amazing personal stories of courage and Inspiration at 3.20pm on Tuesday 26 October

Main Platform 2010

Chris Helder

"The Power of Influence"

Sponsored by



Chris Helder simply owns the space as one of the world's top speakers on the art of reading the client and winning the business.

Where most speakers teach how to talk 'at' clients and colleagues, Chris has a fresh approach that concentrates on understanding those you are trying to influence, in order to create a stronger connection and ultimately result.

His messages can be life changing in both the personal and business spheres; and while Chris is often called upon to keynote sales conferences (one of his specialties) his message is much broader than that.

He delivers powerful messages on leadership, vision building, change management, communication and customer service.

His signature concepts of "Time – Line" strategy development and vision building through his "Chunking Up" process are two of his many tools that underpin his change philosophy.

In this session Chris will cover:

- The Art of Mastering Body Language
- How to read the Client through the Personalities/Intensities
- The Power of Influence to create Win/Win situations
- The 10 tools to separate yourself from the competition
- A list of 1% behaviour changes you can make immediately with instant results

Don't miss Chris Helder at "The Masterclass Breakfast" 7.15 Tuesday 26 October & on the Main Platform at 5pm Monday 25 October for "The Power of Influence"



Sponsored by



Adam Lane

"Managing Trauma Claims and Trauma Claimants"

Adam has worked in the life insurance and financial services industry since 1990. Adam is a Division Director and National Sales Manager for Macquarie Life.

Prior to joining Macquarie in July 2006, Adam spent 9 years in underwriting and in underwriting management roles. Adam has also worked as a BDM for ING and regional sales manager for Metlife.

Don't miss Adam Lane's "How Much is Enough? When the Worst Happens" on the Main Platform at 4.15pm on Monday 25 October

In this session Adam will cover:

- The need for more trauma insurance, including Child Trauma
- The product considerations - pre and post claim
- The three battles of a trauma claimant and how an adviser can genuinely support the claimant
- The importance of the Adviser and Life Company working together
- The Advisers role once the benefit has been paid - how to "manage" the Benefit



Dr Christopher Caton

"Global Economic Update"

Chris Caton is the Chief Economist for BT Financial Group. He was Chief Economist at Bankers Trust from 1991 until July 1999. From 1994 to 1997, he was also Chairman of the Indicative Planning Council, which advised the Government on matters relating to the housing industry.

Previously he worked in the Treasury, the Department of the Prime Minister and Cabinet, and for an economic consulting firm in the United States.

Chris was educated at the University of Adelaide and the University of Pennsylvania.

Sponsored by



You don't want to miss Christopher's knowledgeable presentation on the "Global Economic Update" at 4.20pm on Sunday 24 October

Main Platform 2010

MEET THE Professionals

2010 brings you one of the standout successes from the past two Conferences, "Meet the Professionals".

In 2010 we have created 6 topics to focus on:

- 1. Business Insurance
- 2. Superannuation
- 3. Investments
- 4. Trauma Insurance
- 5. Practice Management
- 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.

Mike Walsh

Futurist & Strategist

"the age of speed... how to operate in a new environment"



Don't miss Mike Walsh at the GenXt Best Practice Breakfast on Monday morning 25 October 2010

Sponsored by



The Secrets to my Success

Mike Penrose

"When disaster strikes..."

On one of his first international deployments, Mike Penrose was hijacked at gunpoint by Chechen rebels. During a six-week ordeal, he survived a mock execution and several stints on the frontline of fighting... and learned a great deal about his ability to act decisively under duress.

In his current role as Director of Emergency Programs at Save the Children Australia, Mike's ability to make quick decisions under pressure has been put to the test by a series of humanitarian disasters including last year's earthquake in Indonesia, the tsunami in Samoa and of course the devastating earthquake that struck Haiti in January this year.



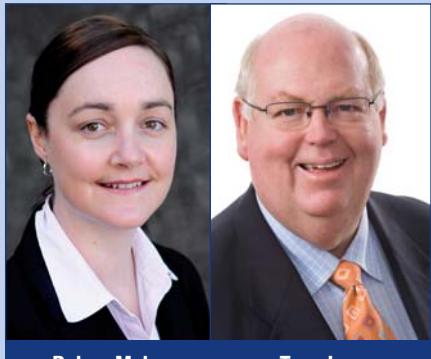
Save the Children



Don't miss Mike Penrose's "When disaster strikes..." on the Main Platform at 9.45am on Monday 25 October

Tony Lye & Robyn Mohr

"Prevention is Better than Death"



Robyn Mohr

Tony Lye

In 2007 Tony Lye weighed in at 165kgs. He had a range of ailments and didn't know that the clock was ticking.

His weight has seesawed over many years and he was a statistic waiting to happen.

It was at the launch of Asteron's "Fitness 2 Live" that the alarm bells started ringing and Tony decided that drastic action was needed.

In this Secrets of my success Asteron's Robyn Mohr will interview Aon's Tony Lye on:

- his journey on the Fitness 2 Live program.
- What his moments of truth have been.
- The impact of losing close friends to major illness's.
- Tony's targets and advice to AFA members.

AFA Conference PROGRAM

Following a very successful 2009 Conference, and based on your feedback, the 2010 Conference will include the following session streams.



GenX 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 & expand your thinking.



Investment & Technical Stream

These sessions are designed for all advisers looking to increase their knowledge with a range of technical and investment issues supported by case studies.

***NEW for 2010* Saturday 23 October, 2010**

8.30 am - 10.00 pm	AFA Elite Adviser Program (invited delegates only)
9.30 am - 7.00 pm	BDM /PDM Masterclass 1
9.30 am - 1.15 pm	GenX Insurance Bootcamp
9.30 am - 1.00 pm	Campus AFA – Transition Program
2.00 pm - 6.00 pm	AFA Charity Golf Tournament - Sponsored by Elders Forrestry
2.00 pm - 6.00 pm	GenX Beach Olympics
2.00 pm - 6.00 pm	AFA Tennis Open
7.00 pm - 10.00 pm	AFA Elite Adviser Dinner (invited delegates only)

Sunday 24 October, 2010

6.30 am	Partner EXPO Bump-in & Set up
8.00 am	Registration Desk Opens
8.30 - 11.30 am	Leadership Masterclass "Growing your profitability by Building an Award Winning Team Dr Clark Perry - Sponsored by ING
12.15 pm	Lunch - AFA Expo
1.00 pm	Conference Welcome & Opening Ceremony
1.30 pm KEYNOTE 1	Industry Panel facilitated by Julie Bennett A high level Industry Panel will address this topic
2.40 pm KEYNOTE 2	"Creating a Fortius Mindset to Deliver Results in Challenging Times" Dr Clark Perry Sponsored by ING
3.30 pm	Afternoon Tea - AFA Expo
4.00 pm KEYNOTE 3	"Global Economic Update" Dr Chris Caton - Sponsored by BT
4.40 pm KEYNOTE 4	Senator Mathias Cormann
5.00 pm	AFA Rising Star Award Presentation - Sponsored by ING
5.30 pm	Day One Close
7.00 pm - 10.00 pm	AFA Welcome Party - Night of Stars supported by ING
10.00pm onwards	After party at the Hydrate Bar

TESTIMONIALS

... what attendees said about the 2009 AFA National Conference

93% of attendees rated the content of the 2009 conference as very high



"We want to congratulate the AFA team on a great Conference. You should all be proud of the event & what you have achieved."

Lyn Bell – Evolve Logic



Great job Richard and the AFA team, the best AFA/LUA/ALA Conference I have ever attended!"

Michael Browne - CommInsure



"Well done, I have been to a lot of Conferences & this has been the best, just a terrific vibe about the place and everyone having a great time."

Marc Bineham – Noall & Co



"Having run major events, I appreciate the planning, management & personal effort required to stage such an experience – excellent job!"

Peter Daly



"Congratulations once again for a fabulous Conference, everything went so very smoothly."

Hugh Crawford



AFA Conference PROGRAM

continued...

	Monday 25th October, 2010		Tuesday 26th October, 2010
7.15 am BREAKFAST A	AFA BREAKFASTS - Choice of A or B Breakfast MDRT Breakfast Masterclass - Sponsored by BT Life “Avoiding the 7 Deadly Sins of Business” - Anthony Bell	7.15 am BREAKFAST A	AFA BREAKFASTS - Choice of A or B Breakfast Business Insurance Breakfast Sponsored by the MLC Risk Specialist Network “Keeping the Jewels in the Family - Intergenerational Family Business Transfers” Jon De-Fries and Chris Tsovolos
BREAKFAST B	GenXt Best Practise Breakfast - Sponsored by Tower “The Age of Speed and Innovation” Mike Walsh, Futurist & Strategist	BREAKFAST B	Breakfast Masterclass - Sponsored by AIA “The 5 Keys of Momentum” - Chris Helder
9.00 am KEYNOTE 5	“Maintaining the Rage” How I Built Bell Partners from Scratch Anthony Bell, Managing Director of Bell Partners - Sponsored by BT Life		SESSION STREAM 4 “How to buy & sell practices and get the right price in a post FFA environment” Steve Prendeville, Director - Kenyon Prendeville
9.45 am PLENARY	The Secrets to my Success Interview with Mike Penrose - Chechen Rebel Hostage & Save the children in Haiti	GENxT	“Secrets of success from award winning businesses” Insights from the Adviser of the Year Adviser Panel with Phil Kewin, Head of Sales - Zurich
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	PRACTICE DEVELOPMENT	“Future Proofing your business... Case studies from the Front Line” Christina Kalantzis, Director - Alexis Risk
11.10 am	Morning Tea - AFA Expo		SESSION STREAM 5
11.40 am GENxT	SESSION STREAM 1 “Confessions from White Hart Lane... The Don McAllister Story” Don McAllister, National Marketing Manager - MLC		“The Wisdom of Solomon... How to manage Ethical Dilemmas in your practice” Dr Mark Sinclair & Dr Jim Taggart OAM
PRACTICE DEVELOPMENT	“The age of speed... How to operate in the new environment” Mike Walsh, Futurist & Strategist. Sponsored by Tower		“Tablets and toys that can transform your business” Michael Harrison, Director - Strategies Plus
INVESTMENT & TECHNICAL	“Advice opportunities in the aged care market for advisers” Louise Biti, Director - Strategy Steps		“Underwriting the uninsurable” Marcello Bertasso, Head of Underwriting - AMP
12.30 pm	Lunch - AFA Expo		Morning Tea - AFA Expo
1.25 pm GENxT	SESSION STREAM 2 “Life is what happens to you while you're busy making other plans” Brook Angove, Senior Financial Planner - Bernie Lewis Wealth Management		AFA ANNUAL GENERAL MEETING
PRACTICE DEVELOPMENT	“Managing your business in times of transition” Adviser Panel with Yvonne Neilson, State Manager - Asteron		Lunch - AFA Expo
INVESTMENT & TECHNICAL	“How far will the Euro Zone debt impact the global economy and why it's important for your clients portfolio's” William Tomac, General Manager - GVI		SESSION STREAM 6 “Foot to the floor & both hands on the wheel. Clearing the hurdles of change for newer Advisers” Brad Fox, AFA GenXt Chair
2.15 pm GENxT	SESSION STREAM 3 “Hunting Elephants... Building a niche in the High net worth client segment” David Hare, Managing Director - YRPS		“The Heartbeat on succession: What's really going on” Andrew Moylan - Practice Exchange and Ian Anderson - CBA
PRACTICE DEVELOPMENT	“Future ready your practice now” Panel interview with Steve Currie AXA, Phil Young AFRM & Sam Aylett AXA		“How I transitioned to a fee based business... Tips and traps from a panel of Experts” Facilitated by Michael Kinens GM Distribution - IRESS
INVESTMENT & TECHNICAL	“Biting the Bullet or biting the dust... Insights from Adviser Research” Andrew Inwood - Brand Management & Shane Kirsch - NAB		SESSION STREAM 7 “Dealing with the Professional Women's Market... BIG challenges, HUGE opportunities, GREAT referrals!” Sarah Rigelhuth, Adviser - WealthMap Financial Strategies
3.05 pm	Afternoon Tea - AFA Expo		
3.35 pm PLENARY	AFA Student of the Year Awards Sponsored by Asteron		“How to give a WOW client experience everytime” Steve Salvia - Southern Financial Strategies
3.55 pm PLENARY	AFA Service Awards AFA awards to Industry Contributors		Protecting your back & enhancing your professionalism. Lessons from the GFC Claire Wivell Plater, Director - Gold Seal
4.15 pm KEYNOTE 6	“Managing Trauma Claims and Trauma Claimants - A Personal Experience” Adam Lane, National Sales Manager - Macquarie Life Sponsored by Macquarie		Afternoon Tea - AFA Expo
5.00 pm KEYNOTE 7	“The Power of Influence” Chris Helder Sponsored by AIA		The Secrets to my Success Tony Lye, Head of Alliances AON with Robyn Mohr, National Manager Asteron
5.45 pm	AFA Cocktail Party - Sponsored by Asteron		Kurt Fearnley
6.30pm onwards	Evening at Leisure		“Never Say Die” - Sponsored by CommInsure
9.30pm-12.30	GenXt Idol at the Hydrate Bar with AFA Band Sponsored by PIS		Conference Close
			AFA Gala Awards Dinner: Venetian Masked Ball AFA Adviser of the Year sponsored by Zurich

AFA Conference-Social

Saturday 23 October 2.00pm – 6.00pm

AFA Charity Golf Tournament

sponsored by



Forestry

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. Mens, Ladies, right & left handed clubs available.

DRESS CODE IS AS FOLLOWS

Acceptable

- Collared shirt
- Tailored shorts

- Long/Short socks
- Golf/Sports Shoes

AFA GenXt Beach Olympics

For the Genxters or Genxters at heart... Come along and surf with the pro's, touch with the Titans or maybe some beach volleyball.

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 volleyball. All this & networking too!

Major sponsor



Surf sponsor



AFA Tennis Open

Come along and enjoy a hit on one of the Resort's championship quality tennis courts!

sponsored by
Perpetual



Cost: \$60 per person - Includes tennis competition & BBQ dinner

What to bring: Hat, sunscreen & tennis racquet

Purpose: Have fun & play tennis

Volleyball sponsor



Massage sponsor



GenXt
bridging the gap...

AFA Conference-Social

for delegates & partners

SUNDAY OCTOBER 24

AFA WELCOME PARTY - NIGHT OF STARS

7.00pm - 10.00pm

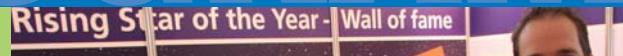
Moonlight and Stargazing at Royal Pines Resort



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.

Rising Star of the Year - Wall of fame



MONDAY OCTOBER 25

AFA SERVICE AWARDS & COCKTAIL PARTY

5.45pm - 6.30pm



Why has the AFA been so successful for 65 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 GENxT IDOL NIGHT: 9.30pm-12.30am



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 26

AFA GALA AWARDS DINNER Venetian Masked 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.

Theme: Venetian Masked Ball

Platinum Ball Black Tie Dinner with fantastic entertainment.

The AFA Foundation will hold their silent auction for charity.

AFA Special Events

AFA AWARDS

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

7.00 pm - 12 am

Find out who will be crowned the 2010 AFA Adviser of the Year at the Gala Dinner. This award is now in its 9th 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 Monday afternoon

Meet future industry leaders at the presentation of the AFA Rising Star of the Year Awards. Sponsored by ING for the 6th 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 third year and will recognise the best and brightest students entering the industry.



AFA BREAKFAST workshops 7.15am - 8.45am

The conference breakfasts will allow you to explore 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 Masterclass

Monday morning 25 October 2010

Avoiding the 7 deadly Sins of Business

with Anthony Bell

Sponsored by



Business Insurance Breakfast

Tuesday morning 26 October 2010

Keeping the Jewels in the Family - Intergenerational Family Business Transfers

with Jon De-Fries and Chris Tsovolos



Sponsored by



GenXt Best Practice Breakfast

Monday morning 25 October 2010

The Age of Speed and Innovation

with Mike Walsh, Futurist & Strategist

Sponsored by



Breakfast Masterclass

Tuesday morning 26 October 2010

The 5 Keys of Momentum

with Chris Helder

Sponsored by



Partners

Big events like these don't happen without support from partners. The AFA would like to thank and recognise the following companies for their support. (current as at August 25th 2010)

Platinum



Professional
Investment
Services



Gold



redefining /
financial services

evotv PART OF THE EVOLUTION MEDIA GROUP

Exhibitors



Money Management



Associated
Advisory
Practices

Family of brands



Media Partner

Financial Standard
For the wealth management professional

Licensee Partners Diamond



Licensee Partners Ruby

Total Financial Solutions
committed to your success



Financial Planning

Financial advice that makes sense



Risk Specialist Network



Commonwealth Financial Planning



financial services partners

Family of brands



Licensee Partners Sapphire



Elite Adviser PROGRAM

BY INVITATION ONLY

The AFA has been advocating for advisers since 1946. We have always had forums where excellence in advice practice can be discussed and shared.

Since the start of the AFA Awards program in early 2002 we have had an array of fantastic winners and finalists. We are now proud to launch an Elite Adviser Program.

who's invited

All winners and finalists of AFA Awards since inception



AFA Elite Adviser Hall of Fame

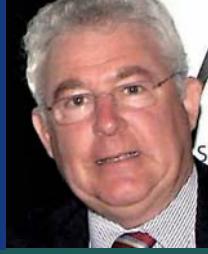
Graham Campbell 2009



Philip Young 2007



Brian Boggs 2004



Paul Daily 2008



Troy Edmondson 2006



Bernie Toohey 2003



Christopher Southgate 2009



Brad Fox 2008



Dr Dennis Maddern 2009



Proudly Sponsored by
ZURICH

Rising Star of the Year



Esther Althaus 2005



Jason Danjoux 2006

Student of the Year



Proudly Sponsored by

ING

Agenda

8.30am	Open and Welcome
8.45am	Workshop 1: Good to Great - The Lessons of truly great businesses
10.15am	Morning tea
10.30am	Workshop 2 - How to get your message heard - Media Training with Julie Bennett
11.10am	Workshop 3: Panel Discussion - Secrets of my Success
12.10pm	Workshop 4: Workshop with Dr Clark Perry
1.30pm	Lunch and your choice of Golf, Tennis or Beach Olympics
7-10pm	Special Elite Adviser Dinner

What is the program?

- Learn share and be challenged
- Industry leadership forum
- High level 1 days program with:
 - Insightful external speakers
 - Workshop & case study based program
 - Panel sessions delivered by the group

When is the program?

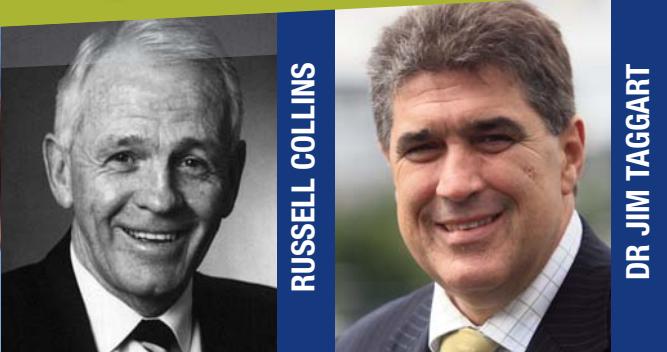
Saturday 23 October, 2010 at Royal Pines resort

Cost \$320 includes:

- Full program
- Guest Speakers
- Lunch, morning & afternoon Tea
- Your Choice of Golf, Tennis or GenX Beach Olympics
- Elite Adviser Dinner

GenXT Insurance Bootcamp

with Russell Collins & Dr Jim Taggart



This session will cover.....

- Introduction to insurance concepts
- Unlocking the passion
- The technical insights of risk
- What to use & when
- Business financial planning

Who is it for?

- All GenXters with a passion for learning
- All advisers who want to learn

What is the program?

Bootcamp intro from Russell Collins & Jim Taggart with:

- Insightful external speakers
- Workshop & case study based program
- Panel sessions delivered by the group

When is the program?

Saturday 23 October, 2010 at Royal Pines resort

Cost \$180 includes:

- | | |
|------------------|------------------------|
| • The program | • Lunch |
| • Guest speakers | • GenXt Beach Olympics |

Agenda

- | | |
|---------|---|
| 9.00am | Open and Welcome |
| 9.15am | Russell Collins
Introduction and
Case-Study Workshop 1 |
| 10.30am | Morning tea |
| 10.45am | Session 2
Dr Jim Taggart |
| 11.45am | Session 3
Panel Discussion with
Jeffrey Scott |
| 12.20pm | Session 4
Dr Jim Taggart &
Russell Collins |
| 1.15pm | Session Close
Lunch and stream to
Golf, Tennis or
GenXt Beach Olympics |

Sponsored by



GenXt
bridging the gap...

BDM of the Future Masterclass

After Minister Bowen's changes how relevant
are you to your best advisers?



ROD BERTINO

This session will cover.....

- The state of the advice market
- What Minister Bowen's changes really mean
- Impact for Advisers, Clients and BDM's
- What your value proposition needs to address after July 2012

Who is it for?

- BDM/PDM/BDO & BSO

What is the program?

BDM of the Future Masterclass will help you:

- 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

When is the program?

Saturday 23 October, 2010 at Royal Pines resort

Cost \$210 includes:

- The program • Lunch • Guest speakers
- Your choice of GenXt Beach Olympics, AFA Tennis Open or AFA Charity Golf Tournament

Leadership Masterclass

with Leadership Expert Dr Clark Perry



Dr Clark Perry is a world leader in elite performance, leadership and team development.

Clark Perry earned his international reputation following enormous success working closely with a wide array of elite athletes, coaches and business leaders, such as the Australian Swimming Team, Australian Cycling, the ARU Wallabies as well as the National Australia Bank, MLC, Toyota and Pfizer.

In his role as Olympic Team Psychologist, Clark Perry has attended four Olympic Games. He has also mentored and worked closely with elite athletes competing in Commonwealth Games, World Championships, Pan Pacific Swimming Championships, and the Super 12 Grand Finals.

In addition to working with elite athletes, he continues to partner with many leading international businesses and sporting teams in his role as Director of Rogen Si.

DR CLARK PERRY

Agenda

- 8.30am Open and Welcome
- 8.40am Session 1 with Dr Clark Perry
- 10.15am Morning tea
- 10.30am Session 2 with Dr Clark Perry
- 11.30am Session Close Stream to lunch and conference registration

Growing your profitability by Building an Award Winning Team

This session will cover.....

- How to be a leader with no positional authority;
- How to build an award winning team;
- How to ensure your team has clarity and purpose;
- How to lead with power and compassion;

Who is it for?

- All conference delegates

What is the program?

Join the Masterclass with Keynote Speaker and Leadership Expert Dr Clark Perry where he will cover such topics as:

- | | |
|------------------------------|---------------------------|
| • 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 | |

When is the program?

Sunday 24 October, 2010 at Royal Pines resort from 8.30am to 11.30am

Cost \$130 includes:

- The program
- Morning Tea
- Guest speaker

ACCOMMODATION information



Accommodation has been 'block booked' by WaldronSmith Management 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 WaldronSmith Management.

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, 2010

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
Mountain View Spa Suite	- Single/Double \$240.00
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 2010 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 2010 or book direct on-line on <http://www.travelctm.com/bookings>.

TRAVEL INSURANCE

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

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 24th 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 by visiting the conference website
at: 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, Waldron Smith Management, 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

WHERE TO GET MORE INFORMATION AND KEY DATES

• • • **REGISTER EARLY & SAVE** • • •

Early Bird Offer Valid ONLY between 15 April, 2010 - 30 June, 2010.

REGISTER ONLINE NOW: www.afa.asn.au

FOR GENERAL ENQUIRIES CONTACT:

Vicki Lont - Waldron Smith Management:

Phone: 03 9645 6311 afa2010@wsm.com.au

FOR MEMBERSHIP INFORMATION CONTACT THE AFA OFFICE

Janelle: (02) 9267 4003 janelle.saunders@afa.asn.au Fax: (02) 9267 5003

MEMBER FREECALL: 1800 656 009

Office Address: PO Box Q279, Queen Victoria Building NSW 1230

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.

Members Full Registration *
(READ CAREFULLY FULL LIST OF INCLUSIONS ABOVE)

Non Members Full Registration

AFA Membership PLUS Registration Package

Group Registrations 5 members @ 5% discount

Day Registration: **Sunday - Monday - Tuesday**
(Please circle your selection)

Partners Program Registration

Early Bird Registration from 1 April - 30 June 2010	Registration after 30 June 2010	
\$1,195.00 <input type="checkbox"/>	\$1,295.00 <input type="checkbox"/>	= \$ _____
\$1,350.00 <input type="checkbox"/>	\$1,550.00 <input type="checkbox"/>	= \$ _____
\$1,450.00 <input type="checkbox"/>	\$1,600.00 <input type="checkbox"/>	= \$ _____
		= \$ _____
\$495.00 per day <input type="checkbox"/>	\$590.00 per day <input type="checkbox"/>	= \$ _____
\$750.00 <input type="checkbox"/>	\$950.00 <input type="checkbox"/>	= \$ _____

TOTAL SECTION B = \$

SECTION C

MASTERCLASS REGISTRATION FEES

Price for 1, 2 or 3 below includes your choice of GenXt Beach Olympics, AFA Tennis Open or AFA Charity Golf Tournament

1. BDM of the future Masterclass

2. Elite Adviser Program

3. GenXt Insurance Bootcamp

Leadership Masterclass with Dr Clarke Perry (Sunday)

Early Bird Registration from 1 April - 30 June 2010	Registration after 30 June 2010	
\$210.00 <input type="checkbox"/>	\$240.00 <input type="checkbox"/>	= \$ _____
\$320.00 <input type="checkbox"/>	\$350.00 <input type="checkbox"/>	= \$ _____
\$180.00 <input type="checkbox"/>	\$210.00 <input type="checkbox"/>	= \$ _____
\$130.00 <input type="checkbox"/>	\$160.00 <input type="checkbox"/>	= \$ _____

TOTAL SECTION C = \$

SECTION D**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

GenXt Beach Olympics

AFA Tennis Open

AFA Charity Golf Tournament (*Club Hire see below*)

Official Welcome Function

Official Gala Dinner

GenXt Idol attendance YES NO **GOLF CLUB HIRE** R L (*PLEASE TICK*) \$45.00

Early Bird Registration from 1 April - 30 June 2010	Registration after 30 June 2010
\$60.00	<input type="checkbox"/>
\$60.00	<input type="checkbox"/>
\$110.00	<input type="checkbox"/>
\$95.00	<input type="checkbox"/>
\$150.00	<input type="checkbox"/>
\$60.00	<input type="checkbox"/>
\$70.00	<input type="checkbox"/>
\$140.00	<input type="checkbox"/>
\$110.00	<input type="checkbox"/>
\$160.00	<input type="checkbox"/>

= \$ _____
 = \$ _____
 = \$ _____
 = \$ _____
 = \$ _____
 = \$ _____

TOTAL SECTION D = \$**SECTION E****BREAKFAST WORKSHOPS**

Masterclass Breakfast Monday 25 October

MDRT Breakfast Monday 25 October

GenXt Best Practice Breakfast Tuesday 26 October

Business Insurance Breakfast Tuesday 26 October

Early Bird Registration from 1 April - 30 June 2010	Registration after 30 June 2010
\$50.00	<input type="checkbox"/>
\$60.00	<input type="checkbox"/>

= \$ _____
 = \$ _____
 = \$ _____
 = \$ _____
 = \$ _____
 = \$ _____

TOTAL SECTION E = \$**SECTION F****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 Waldron Smith Management. The hotel will not accept direct bookings.

ROOM TYPE (*Please tick*) Single Double/Twin Suite Smoking Non Smoking Room Type _____

Check in date ____ / ____ / ____ Check out date ____ / ____ / ____ Arrival Time _____ Departure Time _____

I have arranged to Twin share with _____

RACV Membership Number: _____ appropriate rates will apply

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.

TOTAL SECTION F ACCOMMODATION DEPOSIT = \$**PAYMENT METHODS****Credit Card Payment**Visa Mastercard Amex Name on Card _____Card Number Expiry Date ____ / ____ / ____*A payment processing fee applies to credit card payments. The rate is 1% of the payment amount Visa & Mastercard or 3% for Amex transactions. CCV (3 digit number on back of 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 2010 Conference"

Cheque number _____ Amount: \$ _____ Forward cheques to Conference Secretariat

PAYMENT SUMMARY 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.

SECTION B: TOTAL REGISTRATION FEES \$ _____ **SECTION C: TOTAL MASTERCLASS FEES** \$ _____**SECTION D: TOTAL SOCIAL FUNCTIONS & ACTIVITIES** \$ _____ **SECTION E: BREAKFAST WORKSHOPS** \$ _____**SECTION F: ACCOMMODATION (DEPOSIT/PREPAYMENT)** \$ _____ **TOTAL FEES ENCLOSED (GST inclusive)** = \$

AFA Conference Support

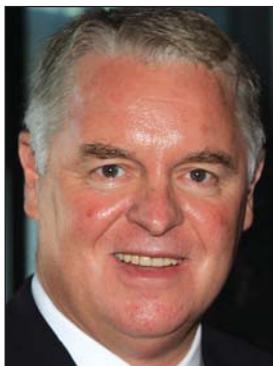
Meet your Conference Organising Team



Pina Sciaronne



Mark Stubbings



Danny Maher



Annick Donat



Richard Klipin



Janelle Saunders



Dennis Bateman



Esther Althaus



Troy Edmondson



Michael Nowak

Meet your PCO



WALDRONSMITH Management

Vicki Lont & Kate Smith

EARLY BIRD REGISTRATION FEE

To validate your Early Bird Registration discount, payment must be made prior to June 30 2010.

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, 2010. 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 2010 AFA National Conference?

- | | |
|---|--|
| <input type="checkbox"/> Brochure in mail | <input type="checkbox"/> AFA email message |
| <input type="checkbox"/> AFA Magazine | <input type="checkbox"/> AFA Website |
| <input type="checkbox"/> 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

AFA Partnership with Audi

Be in the running to WIN a new Audi !!



AFA Announces Partnership with Audi + Win an Audi Raffle

The AFA is pleased to announce another significant benefit for AFA members. Your AFA has secured a Corporate partnership arrangement with prestige car maker, Audi..

Audi Corporate is a benefit package usually reserved for large employer firms. Fortunately the AFA has been instrumental in being able to secure the Corporate Package for AFA Members.

As an Audi Corporate participant, you can receive exclusive benefits and a superior service standard such as:

- No cost, scheduled servicing for 3 years or 45,000 kms (whichever occurs first);
- Free pick-up and drop-off of your Audi for servicing in the CBD (or within a 20km radius);
- Free service loan cars on most models;
- Preferential pricing on new Audi vehicles;
- Preferential interest rate from Audi Financial Services;
- Priority vehicle orders and allocation

To take advantage of this offer, all you need do is show your AFA Membership card at your local Audi Dealership. Alternatively contact the AFA office, and we will email you a letter.

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.

