



INVITATION TO BREAKFAST

BEST INTEREST

WHERE DOES IT BEGIN AND END?

Do you know where your duty of care begins and ends? How will your duty to place your clients "Best Interest" first affect you in the post FoFA world? Now is the time to fireproof your practice and prepare for the changes to come. We'll have Alison Maynard from FOS speaking about how FOS supports our industry and best practice from their point of view. We have Alex Granich of Granich Partners discussing estate planning from a legal perspective, what to look out for and how situations can turn bad. AFA's Phil Anderson will give an update on FoFA and what Best Interest really means in practice for our industry.

If you have referral partners, take this opportunity to invite them along, so you can both better understand how these issues will impact your business, as well as provide opportunities in a post FoFA world.



Guest Speaker
Phil Anderson



Guest Speaker
Alison Maynard



Guest Speaker
Alex Granich

Date

Wednesday 30 May 2012

Time

7.00am – 9.00am

Venue

The University Club of WA
35 Stirling Highway
Crawley WA 6009

Closing Date

Friday 25 May 2012

Cost

AFA Members \$60
Non AFA Members \$70
Table of 10 \$600

AGENDA

- 7.00am** Registration
- 7.15am** Breakfast served
- 7.30am** Welcome – Adam Smith, AFA National Vice President
- 7.40am** Alison Maynard, FOS
- 8.10am** Alex Granich, Granich Partners
- 8.40am** Phil Anderson, AFA COO
- 9.00am** Close



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.



ALISON MAYNARD

Ombudsman, Investments, Life Insurance and Superannuation Financial Ombudsman Service Limited

Alison Maynard is the Ombudsman, Investments, Life Insurance and Superannuation at the Financial Ombudsman Service.

Alison was admitted to legal practice in 1982. After five years as a Solicitor in Community Legal Centres, she became the Supervisor of Clinical Training at Leo Cussen Institute. One of her notable former students is Julia Gillard.

In 1993 Alison was employed by GIO to be the Director of SIO Consumer Appeals Centre. After two years

the centre merged into Insurance Enquiries and Complaints and Alison spent six years there as the National Operations Manager.

Alison was appointed Chief Executive of FICS in 2001 holding that position for seven years until July 2008 when FICS merged with the Banking and Financial Services Ombudsman and the Insurance Ombudsman Service to form the Financial Ombudsman Service. Since that time Alison has held the position of Ombudsman, Investments, Life Insurance and Superannuation.



ALEX GRANICH

Granich Partners Barristers and Solicitors

Having grown up in the Eastern Wheatbelt of Western Australia, Alex commenced practice as a sole practitioner in Merredin in 1976. Alex practiced in most areas of the law whilst in Merredin between 1976 and 1983. He was also actively involved in farming until 1990. In 1983 Alex became a partner in the West Perth firm of Picton-Warlow Granich.

In 1986 Alex started his own firm "Granich & Associates" which operated out of St Martins Tower and the BGC Centre between 1986 and 2001. Brenton Oakley joined Alex as an associate in 1996.

Today, Granich Partners is an incorporated practice with offices in Colin Grove, West Perth and Avon

Terrace, York. Alex has a wealth of experience in all areas of commercial and corporate law, including matters pertaining to small to medium business, farming and mining. Alex's practice also includes estate planning, wills, trusts, deceased estates and taxation.

Alex completed a Masters degree in taxation from the University of Western Australia in 1999 and is well known amongst other professionals for his knowledge and practical advice in the above areas of law.

WA Best Interest Event - Registration



Event Date: Wednesday 30 May 2012 | Closing Date: Friday 25 May 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. <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

WA Best Interest Event - Registration



Event Date: Wednesday 30 May 2012 | Closing Date: Friday 25 May 2012

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

4. Cost

- ☐ AFA Members \$60
- ☐ Non AFA Members \$70

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 you 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.