

Association of Financial Advisers is proud to present

# AFA 2014 NATIONAL ADVISER CONFERENCE

CAIRNS OCTOBER 12 -14 CAIRNS CONVENTION CENTRE

## INNOVATE

Think > Create > Act

earn up to  
**18 CPD**  
points






## Program

Prepared by the Association of Financial Advisers | September 2014  
ACN 008 619 921






**Great Advice** for more Australians

 **a fa**  
Association of  
Financial Advisers








# SUNDAY 12 OCTOBER

8.15am	<b>Registration and Exhibition Open</b>	
8.30am - 9.25am	First Time Attendees Welcome Event	
9.40am - 9.55am	<b>Opening Ceremony</b>	
9.55am - 11.15am	<b>AFA Narrative</b> Exploring The Issues and Opportunities Affecting Financial Advice	
11.15am - 11.55am	<b>Prof Michael Drew &amp; Brian Parker, MLC</b> Building Client Certainty	Investment Curriculum Moderator 
11.55am - 12.55pm	Lunch	
12.55pm - 1.45pm	<b>Jon Burgess</b> The Three Minds Approach	 MDRT The Premier Association of Financial Professionals®
1.45pm - 2.05pm	<b>Rising Star Award</b> <i>Partnered with ANZ Wealth</i>	
2.05pm - 2.40pm	<b>Daniel Flynn</b> A Social Enterprise Born of Innovation	
2.40pm - 3.30pm	<b>Tim Reid</b> Marketing To Win More Business	 Asteron Life Part of the Suncorp Group
3.30pm - 3.40pm	Day Close	
3.40pm - 4.30pm	Afternoon Tea	
4.15pm - 5.30pm	<b>Association of Financial Advisers AGM</b> (for Members)	
7.30pm - 10.00pm	<b>Welcome Reception</b> <i>Partnered with ANZ Wealth</i>	

# MONDAY 13 OCTOBER

7.00am - 8.15am	<b>Plenary Breakfast</b> <b>Amanda Gore</b> Six Secrets to Great Conversations	 
8.20am - 8.50am	<b>AFA Excellence in Education Award</b> <i>Partnered with Asteron Life</i>  <b>Campus AFA Graduation Ceremony</b>	
8.50am - 9.00am	Morning Wrap	
9.00am - 9.30am	Morning Tea	
9.30am - 10.05am	<b>Steve Woodhouse</b> Dignity & Choices: A Client's Perspective	
10.05am - 11.05am	<b>Meet the Professional &amp; Meet the Innovators</b>	
11.05am - 11.50am	<b>Geoff Ross</b> Get a Proper Goal	 <b>ZURICH</b>
11.50am - 12.00pm	Day Close	
12.00pm - 1.00pm	Lunch	
12.15pm - 12.45pm	<b>FChFP Graduate Lunch</b> (Invitation Only)	
1.00pm Departure	Optional Tours depart Cairns Convention Centre	
1.15pm - 3.15pm	<b>Optional Masterclasses</b> <b>Creating Retirement Certainty Masterclass</b> <b>Corporate Superannuation Masterclass</b> <b>Inspire Masterclass</b>	
3.30pm - 5.00pm	<b>Masterclass Networking Activities</b> (offsite)	
6.00pm - 9.00pm	Evening at Leisure	
9.00pm - Late	<b>ClubAFA</b> <i>Partnered with Asteron Life</i>	

# TUESDAY 14 OCTOBER

7.00am - 8.05am	<b>Optional Breakfasts</b> 1. Corporate Superannuation 2. Campus AFA 3. Leaders Forum 4. GenXt		
8.15am - 8.25am	Day Welcome		
8.25am - 9.10am	<b>Paul Taylor</b> Body & Brain Performance		
9.10am - 9.30am	<b>Female Excellence in Advice Award</b> <i>Partnered with TAL</i>		
9.30am - 9.50am	<b>Hon Chris Bowen MP</b> A Vision for Financial Advice		
9.50am - 10.30am	<b>A Profession in Transition: Seeding the next generation</b> Panel Session		
10.30am - 10.35am	Morning Wrap		
10.35am - 11.05am	Morning Tea		
11.05am - 2.10pm	<b>Licensee Leadership Forum</b> Invitation Only: For executive delegates from our AFA Licensees		
11.05am - 11.45am	 <b>FOCUS SESSION STREAM 1</b>	Business Performance Adviser Performance	Advice Strategies 1 Advice Strategies 2
11.50am - 12.30pm	 <b>FOCUS SESSION STREAM 2</b>	Business Performance Adviser Performance	Advice Strategies 3 Advice Strategies 4
12.30pm - 1.30pm	Lunch		
1.30pm - 2.10pm	 <b>FOCUS SESSION STREAM 3</b>	Business Performance Adviser Performance	Advice Strategies 5 Advice Strategies 6
2.20pm - 2.45pm	<b>AFA Recognition &amp; Michael Murphy Awards</b>		
2.45pm - 3.30pm	<b>Will Your Disclosure Hold Up in Court?</b> Panel Session		
3.30pm - 3.55pm	Afternoon Tea		
3.55pm - 4.40pm	<b>Andrew Demetriou</b> Changing the Public's Perception		
4.40pm - 5.00pm	<b>Closing Ceremony</b>		
7.15pm to 1.00am	<b>AFA Adviser of the Year &amp; Practice of the Year Gala Dinner</b> <i>Partnered with Zurich</i>		

## FOCUS SESSIONS

AFA Learning Pillar	Focus Session Title	Session Type
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### • Focus Session Stream 1 • 11.05am - 11.45am

Business Performance	<p><b>Think like a CEO: Adapting your advice model to change</b></p> <p>An increasing number of advisers are adapting their business models to offer both scaled and full advice. We explore the thinking and strategy used by CEO's from advice businesses and dealer groups.</p>	Fundamental Forum
Adviser Performance	<p><b>What do you say after “Hello”?</b></p> <p>All the research points to clients valuing qualities like empathy, engagement and active listening. Discover the ‘art’ of successful client interviews while still discussing the science.</p>	Adviser Case Study Fundamental Workshop
Advice Strategies 1	<p><b>Asset Class Outlook Part 1: Global &amp; Australian Equity Markets</b></p> <p>This practical workshop gives you a deeper understanding of the drivers and outlook for investment markets for you to use with your clients.</p>	Fundamental Forum Workshop
Advice Strategies 2	<p><b>Competing in the SMSF market</b></p> <p>A technical session exploring the basis for appropriate and inappropriate recommendations to establish a SMSF.</p>	Adviser Case Study Expert Forum

### • Focus Session Stream 2 • 11.50am - 12.30pm

Business Performance	<p><b>Where will my new clients come from?</b></p> <p>The relationship between accountants and financial advisers is converging. Workshop the practical steps from an accountants perspective on how to achieve mutual success for all parties.</p>	Fundamental Forum
Adviser Performance	<p><b>Understanding each client’s communication fingerprint</b></p> <p>Use this adviser workshop to discover your behavioural compatibility with those of your clients. Understand your clients’ behavioural influencers and how it impacts their financial decision making.</p>	Adviser Case Study Expert Workshop
Advice Strategies 3	<p><b>Asset Class Outlook Part 2: Property &amp; Global Debt Markets</b></p> <p>This practical workshop gives you a deeper understanding of the drivers and outlook for investment markets for you to use with your clients.</p>	Fundamental Forum Workshop
Advice Strategies 4	<p><b>Meeting your Best Interest Duty when giving insurance advice</b></p> <p>With the help of case studies we will demonstrate the process and advice strategies available to advisers to meet the Best Interest test.</p>	Fundamental Forum Case Study

### • Focus Session Stream 3 • 1.30pm - 2.10pm

Business Performance	<p><b>Motivating &amp; rewarding great advice teams</b></p> <p>Explore the thinking, processes and tools business leaders use to nurture their high-performing advice teams.</p>	Adviser Case Study Expert Forum
Adviser Performance	<p><b>Difficult decisions: Moving Mum &amp; Dad to Aged Care</b></p> <p>Using real case studies you will address both the financial and personal aspects of supporting clients dealing with these difficult life defining moments. Emotional Intelligence can make all the difference.</p>	Adviser Case Study Expert Workshop
Advice Strategies 5	<p><b>Are model portfolios good enough in a Best Interests world?</b></p> <p>Most advisers match a client’s portfolio to their risk profile. This approach created unexpected consequences for clients during the GFC. It’s time to examine the adviser’s responsibility to manage client expectations and consider other portfolio solutions.</p>	Expert Forum
Advice Strategies 6	<p><b>The Complex Financial Plan: Great advice for more Australians</b></p> <p>This masterclass of financial advice will test everyone’s technical ability across the full spectrum of advice opportunities.</p>	Expert Forum Workshop