

AFA NATIONAL CONFERENCE

GOLD COAST OCTOBER 28-30 RACV ROYAL PINES RESORT

TWENTY
12

Pathways to excellence

education + insight + consumers



a fa

Association of
Financial Advisers



Leigh Sales



Jeremy Cooper



Olivia Maragna



Troy MacMillan

WELCOME FROM THE *Chairman*

Marc Bineham Conference Chair



The AFA National Conference is the largest and most anticipated event for the AFA, attracting significant interest among advisers, licensees, product manufacturers and industry professionals alike.

I'd like to share with you my reasons for attending the conference for the past 5 years:

- It makes a huge difference to my bottom line. I value the tips and ideas I get at the 'Meet the Pros' section, I always take back plenty of ideas to implement into my practice that help with new marketing campaigns to my clients and potential clients. It's all about the 1%'s!
- It's great to communicate with industry leaders and keep up-to-date with what is happening in Government, my industry and the world around us, especially in such booming areas as Social Media Networking.
- There's a great community 'vibe' at the conference. You'll be surprised by what ideas and strategies others are willing to share with you!

Building on the huge success of the 2011 National Conference, the AFA is planning an even better conference for 2012. 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 on the Gold Coast.

Marc Bineham
AFA Conference Chairman



MAIN PLATFORM 2012 *Keynotes*

Industry Leaders Panel

Pathways to Excellence



Leigh Sales
Panel Chair

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

These issues will include:

- The future of FoFA.
- The role of advisers.
- The future of superannuation.
- Insurance and savings adequacy in Australia.
- The needs of consumers.
- Open forum.



Senator Mathias Cormann
Shadow Assistant Treasurer



Craig Meller
Managing Director
AMP FS



Jeremy Cooper
Chairman,
Retirement Income
Challenger Limited



Dr Rebecca Shiels
Program Director
Beddoes Institute



Tim Browne
General Manager
CommInsure



Michael Carter
Head of Advice
Distribution
IOOF



Brad Fox
AFA National
President

Senator Mathias Cormann



Mathias is the Shadow Assistant Treasurer and Shadow Minister for Financial Services and Superannuation. He is also the Chair of the Senate Select Committee on the Scrutiny of New Taxes. He was appointed to the Senate to represent the State of Western Australia in June 2007.

Mathias was born in Belgium and decided to migrate to Australia permanently after first visiting Perth in 1994, attracted by the great lifestyle and opportunities on offer in Western Australia. Before migrating to Perth, Mathias had graduated in law at the Flemish university of Louvain (Leuven). He has worked as a Ministerial Chief of Staff to WA State government Ministers, as Senior Adviser to then Western Australian Premier Richard Court and as an Adviser to then Justice and Customs Minister Chris Ellison.

Between 2003 and 2007 Mathias worked for major Western Australian health insurer HBF in a range of senior management roles, including as General Manager

HealthGuard and as General Manager of HBF Health Insurance.

Having joined the Liberal party in Western Australia in 1996, Mathias was elected Senior Vice President of the Perth Division in 2000, State Vice President in 2003 and State Senior Vice President in 2004, a responsibility he fulfilled until March 2008.



Be sure to catch Mathias on the Industry Panel on Sunday 28 October at 1.20pm 'Pathways to Excellence'

connect with speaker @ www.mathiascormann.com.au

Layne Beachley



Layne Beachley has never had it easy, but you would never know it based off of both the personal and professional accomplishments she has earned over the years. Through personal hardship, health issues and political and professional battles, she rose to the top once again in 2006 and claimed her seventh World Title. This accomplishment, along with several historical big wave drops, multiple video segments and numerous professional awards (such as being inducted to Surfing's Hall of Fame in 2006), makes Layne Beachley arguably the best female surfer to ever exist.

Layne's style of surfing is similar to her personality—strong, aggressive and steady. She's looking ahead to break more records and start new projects, like the upcoming Layne Beachley Classic which takes place October 8-14 at Northern Beaches, NSW, Australia. She will also be serving as the Australian women's coach at the Summer X Game's first women's surf competition. When she's not surfing, she's staying busy with her founded charity, Aim for the Stars, a foundation that supports the cultural, academic and sporting dreams of young women.



Be sure to catch Layne's Breakfast Session on Monday 29 October at 7.15am 'Aim for the Stars' Sponsored by IOOF

connect with speaker @ www.laynebeachley.com.au

Sponsored by:



WHAT: The Layne Beachley Story

WHEN: Keynote 2
Sunday 28 October @ 3.20pm



MAIN PLATFORM 2012

Keynotes

Jeremy Cooper



Jeremy Cooper is Chairman, Retirement Income at Challenger Limited.

Jeremy is a lawyer by training with experience across a broad range of financial services disciplines. Prior to joining Challenger, Jeremy was appointed by the Federal Government to chair a wide-ranging review of Australia's superannuation system, now known as the 'Cooper Review'.

Before his review role, Jeremy was deputy chairman of ASIC for five years from mid-2004.

Jeremy is also a member of the Finsia Policy Advisory Council and the Industry Advisory Committee of the Australian Centre for Financial Studies.

Sponsored by:



WHAT: Whats Right and Wrong with our Super System

WHEN: **Keynote 3**
Sunday 28 October @ 4.00pm



Be sure to catch Jeremy on the Industry Panel on Sunday 28 October at 1.20pm 'Pathways to Excellence'

connect with speaker @ www.challenger.com.au/retire/jc.asp

Max Walker



In his life Max Walker has experienced most speaking scenarios in a diverse range of locations – from magnificently appointed high-tech theaters and glamorous ballrooms, to the outdoor arenas of the Australian desert. It is his experience, confidence and ability to deliver that takes the risk or 'unknown quantity' from the speaker equation.

Max has hosted 3,000 plus hours of 'live' television, bringing another strong positive to the presenter role. He is well educated, well traveled, a wonderful story teller and a successful businessman.

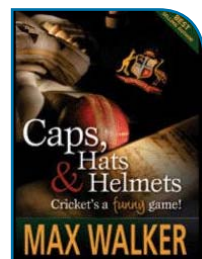
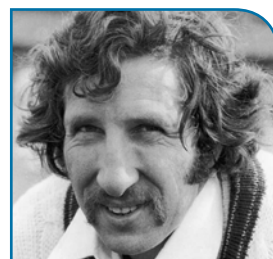
His speaking roles have included formal Master of Ceremonies to hosting complex award events..... keynotes, workshops, after dinner and gala ball extravaganzas. These invitations have enabled Max to travel to most parts of Australia and the world, and have included destinations such as New York, Hong Kong, Tokyo, Dubai, Rio de Janeiro, Bangkok, Vancouver, Cape Town, Hawaii, Johannesburg, Singapore, Harare, London, Auckland etc.

Sponsored by:



WHAT: Life is a Pitch - The Power of Story Telling

WHEN: **Keynote 4**
Sunday 28 October @ 4.45pm

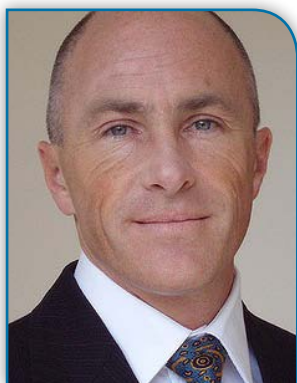


Don't miss Max's Breakfast Session on Monday 29 October at 7.15am 'Wickets, Words and Widgets - The Max Walker Story' Sponsored by Zurich

connect with speaker @ www.maxwalker.com.au



Craig James



On leaving school Craig James joined the (then) Rural Bank, whilst undertaking university studies. He received his Bachelor of Commerce (Economics) at University of NSW in 1984 and then a Master of Commerce (Economics) at the same university in 1988.

He remained at the Rural Bank, which became the State Bank over time and then Colonial, working in branches, Corporate, Planning and Economic Research.

He became chief economist of Colonial Group in September 1997, before becoming chief economist at CommSec in August 2000 with the Commonwealth takeover of Colonial.

In 2002 Craig had a sea-change, joining the Australian Financial Review. He had always wanted to pursue a role in journalism and enjoyed the role as an economic commentator and analysts, finding that he could pursue a journalistic-type role as well as doing more electronic media work at CommSec and rejoined the group in 2003.

On taking the reigns of chief economist at Colonial, Craig endeavoured to style their research in a "user-friendly" way – something that set their research apart and still does today. The approach has been successful in their media work and in promoting Colonial, and then CommSec, to the general public. CommSec is the most quoted economic group in the mainstream media.

Sponsored by:

CommInsure



WHAT: The Global Economy in Focus

WHEN: Keynote 5
Monday 29 October @ 9.00am

connect with speaker @
www.saxton.com.au/craig-james/#videos



Peter Kell



Peter Kell commenced as Commissioner on 7 November 2011. From August 2008 Mr Kell was Deputy Chair of the Australian Competition and Consumer Commission. He was President of the International Consumer Protection Enforcement Network in 2009-2010, and also served on the Consumer Policy Committee of the Organisation for Economic Cooperation and Development. Mr Kell has been on the Australian Government Financial

Literacy Board since its establishment, and is a member of the Commonwealth Consumer Affairs Advisory Committee.

WHAT: Update from Regulator

WHEN: Keynote 6
Monday 29 October @ 11.30am

Glenn Cooper



Glenn Cooper is a fifth generation Cooper and the Executive Chairman at Coopers Brewery who also holds the responsibility of the Marketing. He has overseen the launch of numerous products to the Coopers beer range, including: Coopers Mild Ale, Coopers Dark Ale, Coopers Extra Strong Vintage Ale and Special Old Stout.

Completing his school education at Adelaide's Prince Alfred College in 1967, Glenn went on to study electronic engineering. It was during this time that he worked at SA Brewing on plant equipment – such was the amicable relationship between the two breweries that SA Brewing didn't mind having a Cooper in their midst!

After completing his engineering studies, Glenn then studied for an Associate Diploma in Business Management and eventually left SA Brewing.

At Coopers, Glenn's talent and instinct for marketing saw him take up the position of Marketing Director. Today he is also the company's Executive Chairman. Aided by Glenn's marketing ingenuity, Coopers has cemented a reputation as an ale, stout and home brew producer of the highest quality, and enjoys excellent sales both within Australia and on the export market.

WHAT: Building a Unique Brand in a Crowded Market

WHEN: Keynote 7 Monday 29 October @ 11.50am

connect with speaker @
www.coopers.com.au

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MAIN PLATFORM 2012

Keynotes

Tristan Miller

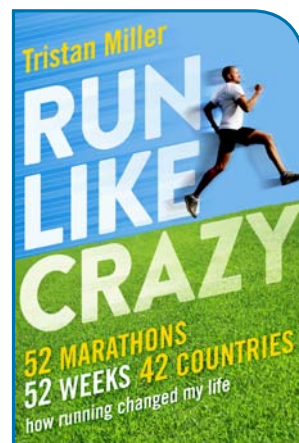


For some this is internally motivated, for others this is inspired through circumstance, mentorship and learning. To inspire you and your conference attendees, TAL is sponsoring famous key note speaker Tristan Miller. Tristan is "that guy" who ran 52 international marathons in 52 weeks.

In the Global Economic Crisis, Tristan lost his job. Instead of looking for a new job, he sold everything and laid out an extraordinary strategy. He left Australian shores to attempt to run 52 marathons in 52 weeks – 42 countries, 7 continents – raising money for the charities, UNICEF and Facing Africa.

Tristan's epic journey saw him traipse the world, mostly alone. He ran in all the major international marathons, including New York, London, Berlin and Tokyo, but also found himself in Rwanda, Mongolia and on Easter Island, in Chile, to name a few. He even ran across the frozen fields of Antarctica!

Tristan made national headlines around the world, creating thousands of avid international followers. His website, RunLikeCrazy.com, and Facebook page have huge numbers of regular visitors.



Sponsored by:



WHAT: Run Like Crazy

WHEN: **Keynote 8**
Tuesday 30 October @ 8.55am

Be sure to join Tristan for a Jogging Training Session on Monday & Tuesday mornings from 6.00am - 6.45am

connect with speaker @ www.runlikecrazy.com

David Baccinelli



Every now and then you receive a phone call from a client that reminds you why you became a risk adviser. For David Baccinelli, these phone calls also bring back vivid memories of a dramatic turning point in his own life.

At the age of 27, David left his career in hairdressing to expand his life experience and work on a prawn trawler in Northern Australia. Before shipping out, he sent a cheque to his life insurance company to make sure his cover was up-to-date. When he suffered a horrific head injury in a storm, David's income protection policy turned out to be a life-saver – giving him the financial support he needed to regain his health and rebuild his life.

Living through this traumatic experience, David learnt how valuable life insurance is, and ignited a passion to help others protect themselves in the same way. Now a Life Risk Specialist, David's presentation will demonstrate how life insurance can turn lives around – providing a powerful reminder of the amazing impact you can have in your clients' lives.

Sponsored by:



WHAT: A Tale of the Heart - with David Baccinelli

WHEN: **Keynote 9**
Tuesday 30 October @ 9.30am

Jessica Watson



Jessica Watson set out to become the youngest person to sail solo non-stop and unassisted around the World. Since Joshua Slocum first sailed singlehanded around the world in the late 1890's, sailors of all nationalities and ages have been drawn to this ultimate challenge: The Everest of sailing.

Slocum's epic tale of his voyage, "Sailing Alone Round the World", has captivated a global audience of readers for over a hundred years.

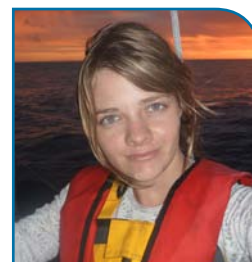
Following on, record-breaking solo circumnavigations by heroes like Francis Chichester and Robin Knox-Johnston have captured the attention and the hearts of people all over the world.

Inspired in her turn by Kay Cottee, the first woman to sail solo non-stop unassisted around the world and by Jesse Martin, the youngest person to do so, Jessica Watson set her sights on beating Jesse's achievement and stopped the nation when she sailed back into Sydney Harbour on 15 May, 2010.

Jessica hopes to continue to inspire our youth, other adventurers and everyone with a dream in their heart.

On January 25, 2011 she was awarded the prestigious Young Australian of the Year title.

In January 2012, Jessica was announced in the Australia Day Honours list, receiving an OAM (Order of Australia Medal) for services to sailing and being a role model for the youth of Australia.



Sponsored by:



MACQUARIE

connect with speaker @
www.jessicawatson.com.au

WHAT: Around the World in 80 Days

WHEN: **Keynote 10**
Tuesday 30 October @ 11.10am

Damien Thomlinson



It was while serving in Afghanistan with the 2nd Commando Regiment that Pte Thomlinson's life was changed forever. On 3 April 2009 whilst on night patrol in the Tarin Kowt District, South Afghanistan, Damien's unit drove over an improvised Taliban bomb. Damien suffered horrendous injuries in the explosion, which resulted in both of his legs being amputated.

The damage to his body was so severe, it is a miracle he wasn't killed.

Most people could not imagine recovering and moving on from something as debilitating as the loss of two limbs... but Damien isn't most people and giving up is not in his nature. Testament to his incredible drive and determination, instead of sinking into depression or retreating from the world, Pte Thomlinson saw the amputation of his legs as just another challenge to be overcome.

WHAT: Insights from the Front Line in Tarin Kowt

WHEN: **Keynote 11**
Tuesday 30 October @ 3.30pm



Sponsored by:



connect with speaker @
www.youtube.com/watch?v=bkZreAISanM

PRE CONFERENCE MASTERCLASS PROGRAM

Overview

GenXt Super Saturday



Masterclass 8.30am - 1.30pm

Day	Event / Session	Title	What it is about
Super Saturday	Workshop (Morning)	Building Foundations of a Successful Business with David King, Managing Director, Vue Consulting 	One of the critical skills of any successful Professional is their ability to find new Client and new business. To "rain-make" for themselves and their firm. Yet, business development and lead generate skills are often learnt by anecdote and trial and error. In this Workshop, David King from Vue Consulting will explore three primary prospecting skills for any Professional – Client Referrals, Business Referrals and traditional Prospecting Skills. This will be a highly interactive Workshop with plenty of audience participation, group activities and take-always. David King is a well-known expert on business development training for Australian Professionals. Expect a lively session with plenty of practical application for your business.

For more information please visit www.vueconsulting.com.au

GenXt Amazing Race 2.00pm - 6.00pm

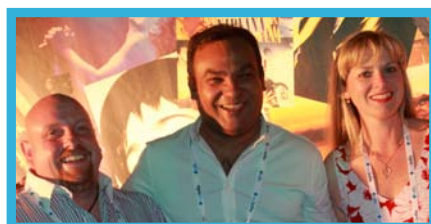
Charity Challenge

Join us for an AMAZING race around the Gold Coast!!



Social Networking - dinner, drinks & awards 6.00pm - 8.30pm

Dinner and drinks whilst awards from the day are handed out. Also gives everyone a chance to kick the conference off with a fantastic networking opportunity.



Sponsored by



With you

PRE CONFERENCE MASTERCLASS PROGRAM

Overview

SATURDAY 27 October 2012

8.00 am	Registration Desk Opens
8.30 am - 1.30 pm	GenXt SUPER SATURDAY Pre Conference Masterclass with David King
2.00 pm - 6.00 pm	GenXt SUPER SATURDAY SPORTS PROGRAM 1. GenXt AMAZING RACE 2. AFA Tennis Open
6.00 pm - 8.30 pm	Social Networking Dinner, Drinks & Awards Hosted by the National GenXt Team

AFA Golf Tournament 1.30pm - 6.00pm

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 golfer's every stroke.



CONFERENCE MASTERCLASS PROGRAM

Overview

Sunday Masterclass

Masterclass 1 - The Best Practice Insurance Masterclass



Aaron Zelman



Baz Gardner

This Masterclass will give you insights, tools and tips into the following key areas:

- Becoming a high performance risk adviser
- Mastering product selection and underwriter relationships
- Building, using and refining your social media message
- Using social media to find clients

Sponsored by:



CONFERENCE MASTERCLASS PROGRAM

Overview

Sunday Masterclass

Masterclass 2 - Creating the ideal culture in your business

To help Advisers understand what they need to do in order to build a high performing team that work together to achieve better business results for all.



Kim Payne



Rachael Trihey

This session will cover the following:

- Creating the ideal culture in your business: Values, behavior and employee value proposition
- Managing staff performance: performance management framework, individual, team and business objectives, incentive program
- Rewarding your staff: remuneration / financial and non financial reward and recognition
- Effective people management: skills to be a better people manager and leader
- Training and development: Individual training and development plans
- Attracting, retaining, recruiting and inducting new staff
- Right roles in the business: organisational structure and role descriptions
- Human Resource legislation: your legal responsibility and options for compliance

Sponsored by:



Masterclass 3 - Can Corporate Super Advice survive post July 2013?



Douglas Latto



Gareth Hall

This session will cover the following major topics:

- What is MySuper?
- How does FoFA affect Corporate Super?
- What to say to your employer clients.
- What changes do you need to make to your business model?



Sponsored by:



Masterclass 4 - Circle of Excellence



Dr Rebecca Sheils



Dr Adam Tucker





The Leading Practices Program is a new Evidence-based Program that has collated Leading Practices employed by finalists of the AFA 2011 & 2012 Financial Adviser of the Year Program and data from over 600 Clients. This session will explore;

- The latest 2012 client experience research
- Becoming the trusted referral
- Growing your Client Relationship
- Delivering on Promises
- Being proactive

Sponsored by:



SUNDAY 28 October 2012

8.00 am	Registration Desk and Partner Expo Opens
8.30 am - 11.30 am	MASTERCLASS 1. The Best Practice Insurance Masterclass with Aaron Zelman and Baz Gardener <i>Sponsored by TAL & AIA</i> 2. Creating the ideal culture in your business with Kim Payne & Rachael Trihey <i>Sponsored by Experience Wealth Consulting & Avant Garde</i> 3. Can Corporate Super Advice survive post July 2013? with Douglas Latto and Gareth Hall <i>Sponsored by Colonial First State, MLC & OnePath</i> 4. Circle of Excellence with Dr Rebecca Sheils and Dr Adam Tucker <i>Sponsored by Beddoes Institute</i>
11.30 am - 12.20 pm	Lunch
12.20 pm - 12.50 pm	OPENING CEREMONY
12.50 pm - 1.10 pm	 Keynote 1 Senator Mathias Cormann The Future of Financial Services
1.10 pm - 2.20 pm	Industry Leaders Panel Pathways to Excellence
2.20 pm - 2.50 pm	Rising Star Award <i>Sponsored by OnePath</i>
2.50 pm - 3.20 pm	Afternoon Tea
3.20 pm - 4.00 pm	 Keynote 2 Layne Beachley The Layne Beachley Story <i>Sponsored by IOOF</i>
4.00 pm - 4.45 pm	 Keynote 3 Jeremy Cooper Whats Right and Wrong with our Super System <i>Sponsored by Challenger</i>
4.45 pm - 5.30 pm	 Keynote 4 Max Walker Life is a Pitch - The Power of Story Telling <i>Sponsored by Zurich</i>
7.30 pm - 10.30pm	AFA Welcome Party <i>Sponsored by OnePath</i>
10.30 pm onwards	AFA – Hydrate Bar

AFA CONFERENCE

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 September 2012).

Platinum



CommInsure



Your Best INTEREST\$



Gold



NO MORE PRACTICE

Silver



Bronze



Licensee Partners

Diamond



Family of brands



Home of Financial Planning



Ruby



Sapphire



financial services partners



Media Partners



Money Management



Exhibitors



CONFERENCE MASTERCLASS PROGRAM

Overview

Testimonials

93% of attendees rated the content of the 2011 conference as very high.



Nina Forbes

"Thanks again for the great conference – well done and you should be very happy with the outcome."



Steve Salvia

"Well done 'team AFA!' That means each and every delegate who attended! What a great vibe and our mantra 'advisers for advisers' really hit the mark."



Troy Beutel

"The Conference was outstanding. The level of effort, innovation and energy that is clearly present in the AFA is very refreshing."



Mark Rattigan

"The AFA is really going somewhere, and there is such a positive feeling amongst the members and very positive leadership in such a turbulent time. Keep making it happen for the next 65 years."



Anne Graham

"I'd like to congratulate the organisers of the Conference – it was well-run, great agenda and the delegates were engaged, enthusiastic and open."



Don Trapnell

"I would regard this year's AFA Conference to be the BEST I have attended both in organisation and content."



Session Streams

GenXt

These sessions are designed for younger advisers or those looking for a refresher. There will be many good stories, tips & opportunities on offer.

Licensee

These sessions are designed for Licensee executives and their distribution teams, the sessions include the major issues concerning FoFA, and the challenges facing Licensees moving forward.

Investment

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

Insurance

These sessions are designed for all advisers looking for technical insurance information together with practice management tips and ideas.

Corporate Super

These sessions are designed for all advisers looking for corporate super information together with practice management tips and ideas.






Leaders Forum

These sessions are designed for experienced Advisers who have been running successful practices for a number of years and are still keen to enhance their risk insurance selling skills as well as advanced areas of estate planning and business insurance.

CONFERENCE MASTERCLASS PROGRAM

Overview

MONDAY 29 October 2012

6.00 am - 6.45 am	Jogging Training Session with Tristan Miller
7.00 am	BBQ Breakky Bar <i>Sponsored by AMP</i>
7.15 am - 8.45 am	<p>BREAKFASTS</p> <p>1. Layne Beachley 'Aim for the Stars' <i>Sponsored by IOOF</i></p> <p>2. MDRT with Max Walker 'Wickets, Words and Widgets - The Max Walker Story' <i>Sponsored by Zurich</i></p> <p>3. Glenn Cooper 'How to distill the essence of your business' <i>Sponsored by Asteron</i></p>
9.00 am - 9.45 am	<p> Keynote 5 Craig James 'The Global Economy in Focus' <i>Sponsored by Comminsure</i></p>
9.45 am - 10.50 am	Meet the Professionals (2 X sessions)
10.50 am - 11.30 am	Morning Tea
11.30 am - 11.50 am	<p> Keynote 6 Peter Kell Asic Commissioner 'Update from Regulator'</p>
11.50 am - 12.30 pm	<p> Keynote 7 Glenn Cooper 'Building a Unique Brand in a Crowded Market' <i>Sponsored by Asteron</i></p>
12.30 pm to 1.00 pm	AFA Excellence in Education Award <i>Sponsored by Asteron</i> AFA Graduation Ceremony
1.00 pm - 1.45 pm	Lunch
1.45 pm - 2.45 pm	<p> SESSION STREAM 1</p> <p>GenXt Licensee Insurance Investment Corporate Super Leaders Forum</p>
2.45 pm - 3.45 pm	<p> SESSION STREAM 2</p> <p>GenXt Licensee Insurance Investment Corporate Super Leaders Forum</p>
3.45 pm - 4.45 pm	Afternoon Tea - Octoberfest <i>Sponsored by Asteron</i>
4.45 pm - 5.45 pm	AFA AGM (Members only)
5.45 pm - 9.30 pm	Evening at leisure
9.30 pm onwards	AFA Voice + Idol <i>Sponsored by PIS</i> Hydrate Bar

TUESDAY 30 October 2012

6.00 am - 6.45am

Jogging Training Session with Tristan Miller

7.00 am

BBQ Breakky Bar *Sponsored by AMP*

7.15 am - 8.45 am

BREAKFASTS

1. SMSF Strategies that work *Sponsored by MLC Risk Specialist Network*

2. Glenn Singleman & Heather Swann

'Never let fear stop you from living your dreams' *Sponsored by BT*

3. An Investment Masterclass

The Panel Discussion with Industry Leaders *Sponsored by LONSEC*

8.55 am - 9.30 am



Keynote 8

Tristin Miller 'Run Like Crazy' *Sponsored by TAL*

9.30 am - 10.05 am



Keynote 9

David Baccinelli 'A Tale of the Heart' *Sponsored by OnePath*

10.05 am - 10.45 am

AFA Circle of Excellence

The best ideas for your business by the AFA's award winning members

10.45 am - 11.20 am

Morning Tea

11.20 am - 12.00 pm



Keynote 10

Jessica Watson 'Around the World in 80 Days' *Sponsored by Macquarie*

12.00 pm - 12.30 pm

AFA Female Excellence in Advice Award *Sponsored by TAL*

12.30 pm - 1.15 pm

Lunch

1.15 pm - 2.10 pm



SESSION STREAM 3

GenXt

Licensee

Insurance

Investment

Corporate Super

Leaders Forum

2.10 pm - 3.05 pm



SESSION STREAM 4

GenXt

Licensee

Insurance

Investment

Corporate Super

Leaders Forum

3.05 pm - 3.30 pm

Afternoon Tea

3.30 pm - 4.20 pm



Keynote 11

Damien Thomlinson 'Insights from the Front line in Tarin Kowt' *Sponsored by AIA*

4.20 pm - 4.40 pm

Closing Ceremony

7.00 pm - Midnight

AFA Gala Awards Dinner

Theme: **JAMES BOND 007**

Incorporating: **AFA Adviser of the Year Award**

Sponsored by Zurich



AFA CONFERENCE

Social Programs

For Delegates & Partners

Sunday, 28 October
7.30pm - 10.30pm

Party like a rockstar at the AFA Welcome Party

The Conference Welcome Party is a great opportunity to make new friends, catch-up with old friends and soak up the resort atmosphere. Rub shoulders with the 2012 AFA Rising Star of the Year Award finalists. We're set for an unforgettable night – don't miss out!

Where
Moonlight and Stargazing at Royal Pines Resort

Sponsored by:



Monday, 29 October
3.45pm-4.45pm

Afternoon Tea - Octoberfest

Sponsored by:



9.30pm-12.30am

The AFA Voice & GenXt Idol Night

Who will be the next AFA idol? Join your conference colleagues and get down with your favourite songs. Sing solo, sing in a group, sing in and out of tune, it doesn't really matter. It doesn't really matter. Come and have a sing along with the AFA Big Band - it's sure to be a BLAST!! All delegates welcome!!

Venue Hydrate Bar

Sponsored by:



Tuesday, 30 October
7.00pm-12.00am

AFA Gala Awards Dinner

A fun filled night with glamour and awards, this party is not to be missed!

Celebrating the AFA Adviser of the Year Award and AFA's contribution to helping Australians secure their financial future. The AFA Foundation will hold their silent auction for charity.

Theme

JAMES BOND 007

Dress Code

Black Tie - Dress to impress!!

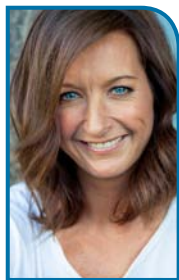
Sponsored by:



AFA Breakfast Workshop

AFA Breakfasts are included in the registration price. You have a choice of 3 breakfasts on Monday and Tuesday.

Monday 29 October, 7.15am



Layne Beachley

'Aim for the Stars'

Sponsored by



Max Walker

'Wickets, Words and Widgets - The Max Walker story'

Sponsored by



Glenn Cooper

'How to distill the essence of your business'

Sponsored by



Tuesday 30 October, 7.15am



SMSF Strategies that work

with Jon De Fries

Sponsored by



Glenn Singleman & Heather Swann

'Never let fear stop you from living your dreams'

Sponsored by



Panel Discussion with Industry Leaders

Facilitated by Wayne Handley

Sponsored by



AFA CONFERENCE *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

Find out who will be crowned the 2012 AFA Adviser of the Year at the Gala Dinner. This award is now in its 10th year and highlights the achievements and commitment to excellence in both the industry and the community.

When:
Gala Dinner, Tuesday 30 October

Sponsored by:



AFA Rising Star

Meet future industry leaders at the presentation of the AFA Rising Star of the Year Awards. Sponsored by OnePath for the 7th year in a row, these awards recognise young practitioners who have achieved a great deal in a short time.

When:
2.20 pm, Sunday 28 October

Sponsored by:



AFA Excellence in Education

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 4th year and will recognise the best and brightest students entering the industry.

When:
12.20 pm, Monday 29 October

Sponsored by:



Female Excellence in Advice

The latest award to join the award program is the Female Excellence in Advice Award. The Female Excellence in Advice Award is a joint initiative of the AFA, TOWER Australia and the Macquarie Graduate School of Management.

When:
12.00 pm, Tuesday 30 October

Sponsored by:



Showcasing Excellence - 2011 AFA Award Winners



Troy MacMillan
AFA Adviser of the Year Award Winner 2011



Olivia Maragna
AFA Female Excellence in Advice Award Winner 2011



Finn Kelly
AFA Excellence in Education Award Winner 2011



Mark Rattigan
AFA Rising Star of the Year Award Winner 2011



AFA CONFERENCE

All Star Team

AFA Board of Directors 2010-2012

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National
President



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President



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TAS
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QLD
Director



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National
GenXt Chair

National GenXt Team



Sarah Riegelhuth
National



Michael Nowak
National



Chris Browne
National



David Pettit
National



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Steve Crawford
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Jo Brassett
N.S.W.



Dave Slovynec
S.A.



Fraser Jack
QLD



Matthew Hawkins
TAS



David Pettit
W.A.



Register before
June 30, 2012
 for your chance to win
1 FREE night
 accommodation at
 RACV Royal Pines*
 see website for more info
 *conditions apply

ACCOMMODATION

Information

This year accommodation bookings will be made directly with RACV and the Radisson so CBE will not be controlling rooming blocks.

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.



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

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.

TRANSFERS

Conference transfers from Coolangatta Airport

A schedule of complementary airport transfers will be made available. All registered attendees will be contacted to make their selected transfer time.

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 Taxi 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 at a cost 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 \$24.00 for a Full Buffet breakfast in Kalinda restaurant.

REGISTRATION DESK

The registration desk will be located on the upper expo level of the RACV Royal Pines Resort at the entrance to the Trade Exhibition from 8.00am on Sunday October 28 and from 7.00am - 5.00pm daily for the duration of the conference.

BUSINESS CENTRE

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: Business casual
AFA Welcome Party: Casual
Gala Dinner: Black Tie (theme: James Bond 007).

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

Where to get more Information and Key Dates
REGISTER EARLY & SAVE

EARLY BIRD OFFER Valid ONLY
 between 1 June, 2012 - 30 June, 2012

For Conference Enquiries
Conference Organiser
 Phone: (02) 8188 1225

For Membership Information
Melissa Favaloro AFA
 Phone: (02) 9267 4003 • Fax: (02) 9267 5003
 melissa.favaloro@afa.asn.au

Member Freecall 1800 656 009

Office Address
 PO Box Q279, Queen Victoria Building NSW 1230

REGISTRATION

Form & Tax Invoice

ABN 2900 8619 921

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, Targeted Program 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



REGISTER ONLINE

by visiting the conference website at www.afa.asn.au

- click on the 'Community & Events' tab and follow the prompts to the Online Registration form

Section A: Registration Fees

Full Registration Fee includes:

*Conference workbook, satchel, admission to all conference sessions, choice of breakfast Monday and Tuesday, all morning/afternoon teas and all lunches, Welcome Party, Octoberfest and Gala Dinner.

Day registration fee includes:

Conference proceedings and satchel, admission to conference sessions, choice of breakfast session Monday and Tuesday, 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, Welcome Party, Octoberfest 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

	Early Bird Registration before 30 June 2012	Registration after 30 June 2012	
Members Full Registration * (Read carefully full list of inclusions above)	\$1,290.00	\$1,490.00	
Non Members Full Registration	\$1,750.00	\$1,950.00	
AFA Membership PLUS Registration Package	\$1,650.00	\$1,850.00	
Group Registrations 5 members @ 5% discount			
Day Registration <i>(Please tick your selection)</i>			
<input type="checkbox"/> Sunday night / Monday	\$675.00 per day	\$775.00 per day	
<input type="checkbox"/> Tuesday & Awards Dinner	\$725.00 per day	\$825.00 per day	
Partners Program Registration	\$845.00	\$1,045.00	

Section B: Masterclass Registration Fees

Sunday Masterclass below includes morning tea and lunch. Super Saturday includes masterclass, morning tea, lunch, amazing race and networking dinner.

	Early Bird Registration before 30 June 2012	Registration after 30 June 2012
SATURDAY GenXt Super Saturday	N/A	\$300.00
SUNDAY MASTERCLASSES		
SUNDAY 1. Aaron Zelman and Baz Gardener	N/A	\$160.00
SUNDAY 2. Kim Payne	N/A	\$160.00
SUNDAY 3. Douglas Latto and Gareth Hall	N/A	\$160.00

Section C: 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.

	Early Bird Registration before 30 June 2012	Registration after 30 June 2012
GenXt Super Saturday (race & dinner only)	N/A	\$125.00
AFA Tennis Open	N/A	\$90.00
AFA Charity Golf Tournament (Club Hire see below)	N/A	\$140.00
Official Welcome Function	N/A	\$130.00
Official Gala Dinner	N/A	\$180.00
GOLF CLUB HIRE		\$45.00

AFA CONFERENCE SUPPORT

Organising Team



Marc Bineham



Pina Sciarrone



Danny Maher



Annick Donat



Richard Klipin



Anne Fuchs



Mark Stubbings



Esther Althaus



Steve Crawford



Richard Dunkerley



Leah Waldie



Mark Vilo



Rachel Trihey



Fraser Jack



Niall McConville



Tony Virtue



Laura Halbert



Russell Collins



Terry Rhodes



David Deck

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 23, 2012. 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.

Meet your PCO

Targeted Program Management are pleased to once again partner with the Association of Financial Advisers for their annual conference. Working with the AFA on all levels covering registration, accommodation, exhibition, program, social and onsite management, Janette Beedell, Dee Foster and team look forward to celebrating a successful 2012 National Conference with you.

