

BFP Annual Conference 2019

“Defining our Value –
Leading through Change”

19-20 September 2019

Marriott Hotel, Brisbane



B | F | P

Boutique Financial Planners

Welcome from the BFP President: Dacian Moses

"Defining Our Value - Leading Through Change"

The 2019 theme is very apt given that our group has an incredible opportunity to represent the future of financial advice in Australia – as we have very few of the failings identified by the Royal Commission and already possess many of the qualities that wary and discerning consumers are seeking.

The BFP conference committee has done a superb job on your behalf and once again, BFP members will be providing most of the content. Topics include business ideas, service provision, pricing, compliance and succession.

We will apply for FPA accredited CPD hours for the event.

BFP membership and conference costs are a small fraction of the value they provide, and I encourage you all to be an active part of our adviser community.

In what has become a tradition, there will be a social event on the Wednesday night before the conference begins. This is a great way to put faces to email addresses and catch up with old friends.

Come and experience our collective wisdom which is being harnessed for the greater good.

challenge + disruption = opportunity

There has never been a better time to be a professional financial planner.



Conference Aims

“Defining our Value – Leading through Change”

The 2019 conference program has been carefully crafted to harness ideas from within the group while matching the key learning requirements of our profession.

We aim to do this by leveraging our knowledge through learning from one another in a consultative and respectful manner, recognising we each have our own individual business models and style ...and that is what makes us each unique!

Information will be imparted in a number of ways including through presentations, panel sessions and interaction with attendees.

Key sessions are designed to help us define our value in a fragmented market while reinforcing how we can lead through the changes afoot.

There will also be plenty of time to network and socialise!

Conference

Cost:	\$750 per person
Early Bird Discount	\$650 per person
Non Member:	\$1,250 per person
Bookings close:	1 st September 2019
Additional dinner ticket:	\$130 per person

Pre Conference Social Event

Ticket:	\$40 per person
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Pre Conference Social Event

Social event

Wednesday, 18th September, sees the return of the well attended pre-conference evening function – in a somewhat more relaxed format to enable us to catch up with old friends and to make some new ones too while enjoying great food and full bar service at this iconic Brisbane location.

The venue offers spectacular riverfront views of the Story Bridge and Brisbane skyline with balcony access to enjoy the balmy Queensland weather expected at that time of the year.

Event details:

Date:	Wednesday, 18 th September
Venue:	Bar Pacino
Address:	175 Eagle Street, Brisbane
Time:	6pm till late
Cost:	\$40 per person
Refreshments:	Shared gourmet platters provided Drinks can be purchased at the bar

If you wish to attend this event you will need to note this when registering.

Partners are welcome to attend however they must register to do so. You can register them when making your own booking.

Conference Program

Conference Program

The 2019 BFP Conference has been built around the following key themes:

- ▶ **Communication and Promotion**
- ▶ **Ethics and Compliance**
- ▶ **Technology**
- ▶ **Pricing Models**
- ▶ **Review Services**
- ▶ **Business Management**

Our agenda is packed full of topic experts drawn from both within and outside of the BFP membership. Presentations will be undertaken in a range of formats to engage and educate attendees – all being facilitated by an articulate and experienced Master of Ceremonies.

Rounding off the conference will be segments on **Hot Topics** and **Specialist Services** offered by BFP Members.

Ethics and Compliance

Given the importance of these key areas we have secured experts in their respective fields to provide information and practical tips to guide us.

Financial Planning Association

Dante De Gori, Chief Executive Officer of the FPA, will provide an update on the FPA's work relating to various changes facing our profession.

Regulatory Oversight

An in-depth look at the regulator's approach post Royal Commission.

Being 'Audit Ready'

This session, being delivered by a knowledgeable Professional Standards Consultant working within the Financial Planning sector, is designed to provide practical guidance about what you need to have on hand during an ASIC audit to demonstrate your commitment to, and compliance with, the regulations governing our profession.

Ethics

Dr June Smith, Lead Ombudsman – Investment, Advice and Superannuation with AFCA, and an experienced expert in ethics in financial planning, will outline how we can best demonstrate ethical behaviour to clients, peers and regulators.

Learning Categories: Regulatory Compliance and Consumer Protection & Professionalism and Ethics

Technology

“Human led and digitally powered, fintech presents a real opportunity for our profession”

Dante De Gori, CEO Financial Planning Association of Australia

Having a thorough understanding of technology and the benefits that it provides is an essential part of running a successful modern financial planning business.

The technology section of the conference will provide you with an opportunity to gain insights and ideas from your peers around why fintech is not a threat, but rather an opportunity that can provide you with greater leverage and efficiency to run a better and more profitable business.

Learning Category: Technical & Client Care and Practice

Pricing Models

A diverse panel of 4 BFP members, drawn from both regional and metropolitan practices, will provide an overview of their pricing models.

To provide context, each panel participant will start with a short overview of their practice model and service offering.

Our MC will be the session moderator and post introduction he will pose a series of questions to the panel, covering the following key elements:

- **Pricing model methodology and history**
- **Criteria for any fee discounts offered**
- **How any pricing changes were implemented**
- **Management of fee increases**
- **Fee collection process**

Attendees will have the opportunity to pose questions at the end of the formal portion of the session.

Learning Category: Client Care and Practise

Review Services

A panel consisting of 4 BFP members drawn from both regional and metropolitan practices, will provide an overview of their review service offering.

To provide context, each panel participant will start with a short overview of their practice model.

Our MC will be the session moderator and post introduction he will pose a series of questions to the panel, covering the following key elements:

- **What review service options are offered to clients**
- **What does the review service consist of**
- **How is it delivered**
- **What do the review reports look like**
- **How often are reports provided**
- **How is the service managed from a business perspective**

Attendees will have the opportunity to pose questions at the end of the formal portion of the session.

Learning Categories: Client Care and Practice & Professionalism and Ethics

Business Management

Business Continuity

Mergers, acquisitions and succession are key elements to consider when seeking to secure the long-term success and viability of our businesses - or for meeting future challenges.

They are also important elements if we are to leave a lasting legacy of our leadership.

Ken Hanlon's session provides the opportunity to hear from a BFP member and business consolidator and to learn from his experiences.

Learning Category: Client Care and Practice

Key Note Speaker : Josh Norbido

Josh Norbido combines his passion for business and magic to inform and entertain us with his presentation:

“The Magic of Sales”

Become More Memorable And Engaging

Sales is helping people believe in a solution.

Without the ability to sell others on your idea, skills or services there is no business.

So, how can we best sell the benefits of our skills and services?

Josh explains and demonstrates on stage the principles that allow you to engage your clients and create an atmosphere more conducive to establishing relationships.

“Engage me and you can make me convince myself”

"Tell me and I'll forget. Show me and I'll remember.

Involve me and I'll understand."

-Confucius

A session that will engage our mind and spirit to conclude our learning for the day and lead us into the conference dinner!

Learning Category: Client Care and Practice

Conference Dinner

The 2019 conference dinner will provide attendees with further opportunities to network and socialise.

Following pre dinner drinks we will be served a 3 course seated meal accompanied by a selection of beverages.

The conference dinner is included in the conference fee.

Your partner is welcome to join us at this dinner at an additional cost of \$130. If you would like your partner to attend please include them on your registration form.

Dress: Smart casual



Useful Information

Conference Attire

Recommended dress for the conference and all social events, including the conference dinner, is smart casual.

Feedback

Providing feedback enables the conference committee to plan to meet your needs. We ask that everyone completes the feedback form before leaving each day. Forms will be on the conference tables. Simply hand your completed form in at the door before exiting each day so that these can be recorded for CPD purposes.

CPD Points

The BFP Chair will seek CPD points from the FPA in regard to this conference and the content it provided.

Accommodation

Guests can book accommodation using link below. This gives a 10% discount from the best available rate at the time of booking.

[Book your corporate rate for Conference Attendee Rate](#)

Alternatively, guests can call The Marriott Reservations Team on (07) 3303 8000 and quote the **KF7** rate code.

Parking

Secure Valet parking is available for conference participants at a discounted rate of \$35 per day via the Howard Street entry. Standard valet parking rate is \$49 per day. Parking at events is subject to availability, with limited parking available.

2019 Conference Committee

Angela Martyn	Personal Financial Services, Melbourne
Brent Giles	Kennas Financial Services, Rockhampton
Narelle Martin	Secure Future Financial Planning, Brisbane
Wayne Roggero	Strategic Solutions Australia, Brisbane

Registration Information

Registration, Cost & Payment Options

To register, simply use the registration link provided:

<https://tas.currinda.com/register/event/1954>

Please contact The Association Specialists on (02) 9431 8600 or at bfpconference@theassociationspecialists.com.au if you experience any problems when registering for the conference.

Conference Cost:	\$750 per person
Early Bird Discount:	\$650 per person
Early Bird Closes:	31 st July 2019
Non Member:	\$1,250 per person
Bookings close:	1 st September 2019
Additional dinner ticket:	\$130.00 per person
Pre conference Social Event:	\$40 per person

All cancellations or alterations must be put in writing to the BFP 2019 Conference Secretariat at: bfpconference@theassociationspecialists.com.au
A cancellation fee of \$100 will apply to registrations cancelled before Wednesday 31st July 2019. No refunds will be made after this date.

Payment

Payment options are outlined on the registration form available via the link noted above.

Please note that standard merchant fees apply for credit card payments (Mastercard & Visa 1.5% and American Express 2%).