



SOS PROGRAM

THE SECRETS OF SUCCESS MENTORING PROGRAM

One of the many advantages of becoming an AFA member is access to the Secrets of Success network. The SOS program entitles every new adviser to be assigned a mentor from our profession - someone who has

*experience, insight, practical know-how
and a willingness to share it.*



We see this program as a significant advantage to new advisers. To receive another perspective or approach can broaden the experience base and contribute to the development of a new adviser. We see the mentor adding another dimension that augments the support and guidance a new adviser is receiving from their current environment and network.

The mentors are there for the new adviser to contact as regularly as they establish at their initial meeting. It is not an obligation, just another resource.

Where possible, a new adviser will be assigned a mentor within a reasonable geographic location and an email of introduction will be provided by the AFA on behalf of both the new adviser and the mentor. The new adviser will then have the onus to make contact with their mentor with a view to arranging a first meeting to discuss how they will engage with each other in the SOS Mentoring Program.

Both the mentor and the new adviser then share the opportunity of future contact - once again, there is no obligation. This is an optional resource for new advisers to expand their peer network.

Our preferred outcome is that both the new adviser and the mentor grow from the experience, and that each can translate the benefits into being a better adviser and contributor to our profession.

The AFA believes this is an exceptional opportunity for experienced advisers to give something back to the next generation of professionals and thus we appeal to you to volunteer a little of your time to take on a mentoring role.

Regards
Brad Fox,
GenXt National Chair



Mentors must meet the following guidelines:

- Have at least 7 years experience as an adviser or 3 years as a practice principal
- Be a member of the AFA
- Be recognised by their peers for honesty, integrity and high levels of professionalism
- Provide insurance and/or investment advice in their practice
- Be prepared to offer impartial guidance on issues such as practice growth, selling skills, employee management, client processing and work flow systems, but without being obligated to give specific product advice
- There must be a desire to further the development of new advisers.

“... experience, insight, practical know-how and a willingness to share it.”

If you are interested in either becoming a mentor or benefiting from the SOS Program as a new adviser, please contact:

National SOS Co-ordinator Nathan Morgan 0404 022 948

AFA Head Office	02 9267 4003	GenXt National Chair Brad Fox	03 8746 8066
VIC GenXt Chair Ammie Komel	03 9328 3900	NSW GenXt Chair Paul Banner	02 9461 0490
TAS GenXt Chair Rob Schiliro	03 6334 6477	QLD GenXt Chair Michael Nowak	07 3871 8208
SA GenXt Chair Dave Slovinec	0417 874 611	WA GenXt Chair Sarah Ryan / Sarah Wood	08 9322 9199

