
AFA National **Conference** 2009

GOLD COAST October 4-6 • RACV Royal Pines Resort

AFA AGM 2009

Presidents Report

creating the future...



Agenda

- Mission & Mandate
- Public Affairs
- Strategy 2009 / 2010
- Events
- Membership
- National Conference
- AFA Partners
- Education
- Summary

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Creating the future...

The AFA's Mission & Mandate

- By adviser for adviser
- Voice of advice
- Build the standing of it's members
- Build the standing of advice
- Education: Peer to Peer
- Key advice on messages in the media
- Build these issues at the grassroots in the states & regions

Public Affairs

- The Voice of Advice
- Input into all major Government submissions
- RG126 ongoing consultation (PI Offer, Alexis Insurance Brokers)
- Nick Sherry Committee, Financial Services Consultation Group
- ATO working groups
- Regular contact with Regulators & Government
- Strong media relationships
- Focused on trade media
- Financial Standard, IFA, Money Management, Asset, I&T

AFA Strategy 2009/2010

- Government & Policy
- Membership
- Education
- GenXt / SOS Mentoring
- Building the Regions
- Licensees

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Creating the future...

AFA Events

- Over 70 events nationally
- GenXt Roadshows
- Plan for Life Awards
- National Forums
- Launch of Regional Chapters in VIC, QLD & NSW

GenXt & SOS

- Growth of GenXt has been most exciting
- GenXt National Roadshow in all states plus numerous state based GenXt Events
- Interest is continuing to grow
- Transfer of skills & knowledge
- GenXt Members of today are the industry leaders of the future

Membership

- Current Membership 1360
- Current level of Membership up by 45% on 2006
- Target is 2000 members by this time next year
- I challenge you all to recruit at least one new member by 31 December 2009, if we each do this we can double our membership in two months

AFA National Conference

- This Conference a credit to the Conference Committee & Conference Organisers – Conference Plus
- Well done to all, all of your hard work has produced the best AFA Conference to date !

AFA Partner Sponsors

- Thank you to all of our Partners whose financial and personal support allows our Association to be more relevant & effective in lifting the profile of the value of advice in the Financial Services profession.

Education

- AFA Education is critical & important
- AFA has been long term in education
- Core member offer
- Future focus & direction of AFA Market needs
- FChFP – Unit 1 is built and has been piloted
- Focus on advice & consumer outcomes

Summary

- Membership is growing steadily
- AFA well represented in media & Government
- Events are growing & well attended throughout the country
- AFA Foundation Established
- Relationships & representation internationally
APFinSA, APLIC