



PLAN FOR LIFE
ACTUARIES & RESEARCHERS

AFA 
ASSOCIATION OF FINANCIAL ADVISERS LTD
ABN 29 008 619 921

LIFE COMPANY OF THE YEAR 2009



SPECIAL GUEST SPEAKER
KERRY CHIKAROVSKI
ON LIFE AFTER THE RIPOLL REPORT

Life Company of the Year 2009 incorporating:

- Life Company Product & Service Quality Awards
- Annuity Provider of the Year
- Investment Bond of the Year
- Product Innovation of the Year

Wednesday 24 February 2010 @ 11.45 am - 2.30 pm



INVITATION TO

Life Company of the Year 2009 incorporating:

- Life Company Product & Service Quality Awards
- Annuity Provider of the Year
- Investment Bond of the Year
- Product Innovation of the Year

You are invited to the Plan For Life / AFA Life Company of the Year 2009 Awards, incorporating Life Company Product & Service Quality Awards and Annuity Provider of the Year.

What are the Awards?

These Awards recognise excellence in the provision of products and services to financial advisers and their clients.

Where & When

Location

Doltone House, Jones Bay Wharf
Piers 19-21 Upper Deck
26-32 Pirrama Road, Pyrmont Point
Note: Allow 15min walk from Darling Harbour

Date

Wednesday 24 February 2010

Time

11.45am - 2.30pm

Program

11.45am Arrive & Drinks
12.30pm Welcome & Lunch
1.00pm Awards Ceremony Commences
2.15pm Coffee & Dessert

Award Categories

1 LIFE COMPANY OF THE YEAR AWARDS 2009

Product Awards - 3 Awards

- a. Term Life/TPD Award
- b. Trauma/Critical Illness Award
- c. Income Protection Award

Service Quality Award - 1 Award covering:

- New Business/Underwriting Services
- Claims Services
- Business Support Services

Platinum Award

The Platinum Award – Life Company of the Year 2009 will be won by the company that achieves the highest combined score across both the product and service quality areas.

2 ANNUITY PROVIDER OF THE YEAR AWARDS 2009

1 Award:

Annuity Provider of the Year - Overall

3 INVESTMENT BOND OF THE YEAR 2009

1 Award:

Investment Bond of the Year - Overall

4 PRODUCT INNOVATION AWARD 2009

1 Award:

Product Innovation Award of the Year - Overall

JUDGING PROCESS

To ensure rigour, fairness and transparency in the awards process the assessment for the Life Company of the Year Awards is completed in two parts:

Part 1: The Product Awards. These are based on data provided by participating companies to Plan For Life on a quarterly basis, combined with service quality input.

Part 2: The Service Quality Award. This has been conducted via a web based survey of AFA members, Plan For Life client dealer groups and the broader adviser community.

The outcomes of these Awards are significantly impacted by adviser feedback in the rating of their suppliers.



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MASTER OF CEREMONIES



DANNY MAHER

Danny has been a member of the AFA since joining the industry in 1979. He has held various executive roles within distribution on both the Supply and Advice side, with Colonial, Tower and more recently the AFS Group.

He has a passion for working with Advisers to “corporatise” their business to become a standalone entity without the dependency of the Principal. His broad SME experience has seen Danny build distribution channels from the ground and forge new business opportunities with niche markets.

A competent public speaker, Danny has presented at many AFA events, PD days and industry conferences, as well as hosting the Life Company of the Year Awards in 2008.

Married to Jenny with two adult girls he is a frustrated Geelong supporter, avid water skier and has a golf handicap similar to his age.

GUEST SPEAKER



KERRY CHIKAROVSKI

After a career as a solicitor, Kerry Chikarovski was first elected to the New South Wales Parliament in May 1991 to represent the northern Sydney seat of Lane Cove.

After thirteen months in Parliament she was appointed Minister for Consumer Affairs. During her time as Minister, Mrs Chikarovski facilitated national agreement to the Introduction of a Uniform Credit Code.

In Government, she held the further portfolios of Assistant Minister of Education, Minister for Industrial Relations, and the first Minister for the Status of Women appointed in NSW. With her dual responsibilities of Industrial Relations and Women, Kerry oversaw the development and introduction of flexible working conditions for the public sector and the implementation of mentoring programs to encourage women to seek careers at the highest level of the NSW public service.

In December of 1994, Kerry Chikarovski was elected Deputy Leader of the NSW Parliamentary Liberal Party – a position she held until the state election the following year. In Opposition, Kerry Chikarovski held the portfolio responsibilities of Corrective Services and the Environment. On 7 December 1998, Mrs Chikarovski was elected Leader of the NSW Parliamentary Liberal Party, the first woman to lead a major political party in NSW. She was also the Shadow Minister for the Arts, Ethnic Affairs and Women.

Since retiring from politics, Kerry has run her own consultancy business which works with small and medium sized enterprises on strategies to help them grow. In July 2003 she was appointed by Premier Bob Carr as a Trustee of the Sydney Cricket Ground and Sydney Football Stadium Trust.

REGISTRATION

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Event Date: Wednesday 24th February 2010 • **Closing Date:** Friday 19th February 2010

1. PERSONAL DETAILS

Title: Name:
Surname:

2. CONTACT DETAILS

Company:
Mailing Address:
City: State: Postcode:
Phone: Fax:
Mobile: Email:
Special Requirements (e.g. access, dietary, other):

3. NUMBER OF PEOPLE ATTENDING?

| NAME | PHONE NUMBER |
|--------------------------|--------------------------|
| 1. <input type="text"/> | 1. <input type="text"/> |
| 2. <input type="text"/> | 2. <input type="text"/> |
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| 9. <input type="text"/> | 9. <input type="text"/> |
| 10. <input type="text"/> | 10. <input type="text"/> |

4. COST

- AFA Member - \$145 (inc GST)
 Non AFA Member - \$165 (inc GST)
 Tables of 10 - \$1,450 (inc GST)

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5. PAYMENT DETAILS

Please charge \$ (gst incl) to my (please tick) Bank Card Master Card Visa AMEX

Cardholder's Name:

Credit Card Number: Expiry Date: /

Signature:

Enclosed is my cheque made payable to: Association of Financial Advisers Ltd.

EFT - BSB 082-926 A/C No. - 028 57 3951

Ref: (date of event) / Surname:

6. AFA FOUNDATION - YOUR SUPPORT OF AFA FOUNDATION IS MUCH APPRECIATED

The AFA has launched the AFA Foundation.

Please feel free to make a tax deductible donation, we look forward to your support.

AFA Foundation Donation: \$20 \$50 \$100 Other \$



Please send or fax all registration forms to the AFA National Office:

AFA NATIONAL OFFICE

JANELLE SAUNDERS

PO Box Q279, Queen Victoria Building NSW 1230

Ph: (02) 9267 4003

Fax: (02) 9267 5003

Email: janelle.saunders@afa.asn.au

MELISSA FAVALORO

PO Box Q279, Queen Victoria Building NSW 1230

Ph: (02) 9267 4003

Fax: (02) 9267 5003

Email: melissa.favaloro@afa.asn.au

All registrations will be confirmed by email.

A receipted tax invoice will be emailed to the address on your registration form.

Cancellation Policy

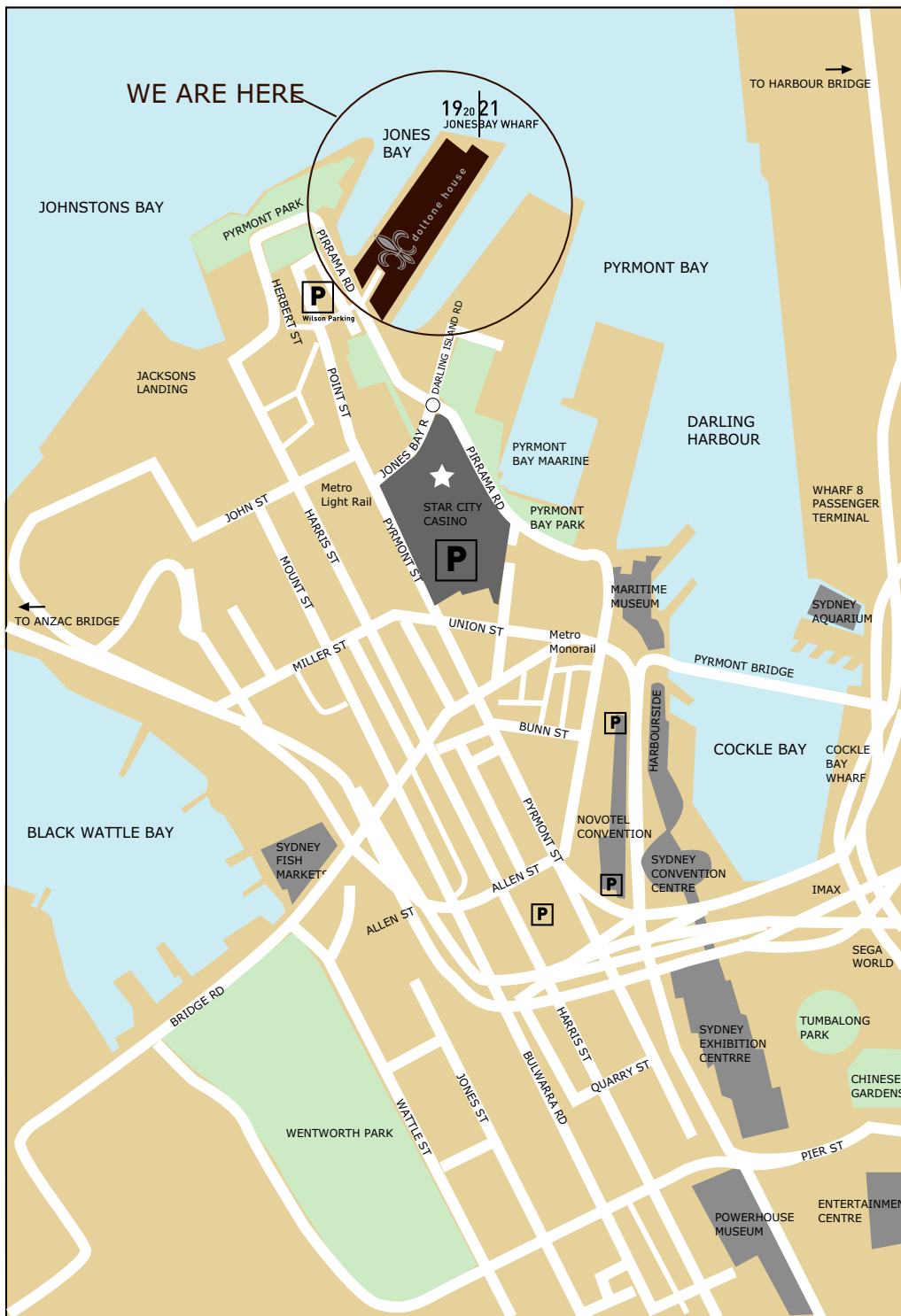
The AFA will refund the cost if the applicant notifies the AFA seven days prior to the commencement of the program of their intention not to attend. If you do not notify the AFA seven days prior to the commencement of the program you will not be entitled to a refund. You may nominate another person to attend in your place.

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Location Map



upper deck, jones bay wharf
piers 19-21 pirrama rd pyrmont point