
AFA National Conference 2009

GOLD COAST October 4-6 • RACV Royal Pines Resort

Welcome to the AFA National Conference 2009

creating the future...



AFA National **Conference** 2009

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Practice & Development

Session Stream 4

Panel Discussion



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Panel Discussion

**Dealer Group – large, small, or independent....
what to consider?**



Panel Members



Peter Daly
Group CEO
AFS Group Limited



Steven Davison
Head of Acquisitions and Succession
AXA's Financial Advice Network



Graham Peatey
Managing Director
The Encore Group



Jack McCartney
General Manager
Commonwealth Financial Planning
Business Wealth Division

What do financial advisers want from their dealer group?

The Brandmanagement “Rules of Attraction 2007” survey of 1350 advisers indicated;

- “Lack of support” was the main factor in an adviser’s decision to leave a dealer group (2 out of 3 indicated that this was the trigger).
 - 2009 - ‘support’ is still the biggest potential factor that would drive planners away from an incumbent licensee (57.3% stating this).
- Rather than looking towards the dealer group as a provider of products, advisers look towards the dealer group for business support in the areas of skill development, business coaching, market intelligence, and technical support.
- What really matters to them is the support and resources that a dealer group could offer, to help advisers deliver a quality and professional service to their clients.

Dealer Group Model

