

MDRT Speak – bring one idea home and you've paid for your trip!



MDRT

The Premier Association of
Financial Professionals®

MDRT Australia E-news

AUTUMN 2011

W: www.mdrtaustralia.net
E: service@mdrtaustralia.net
P: 1300 833 892
M: 0417 673 024

Founded in 1927, MDRT provides its members with resources to improve their technical knowledge, sales and client service while maintaining a culture of high ethical standards.

WHOLE PERSON THOUGHT

"The MDRT Annual Meeting is my gift to myself." *Diane Giraldeau, MDRT Canada - Quebec*

A word from our Australian Chair

This year we have seen unprecedented catastrophes around the world, which have caused immense loss of life, livelihoods and possessions. The generosity of the MDRT family has come forward with much financial support given to the affected areas, and these avenues of support have been instigated by MDRT members. Earlier this month the MDRT Grant of **US\$10,000** was presented to the Salvation Army Queensland Flood Appeal which was gratefully received.

In our roles, we are in a privileged position to not only help financially, but also being involved in the communities. Many MDRT Members are doing this through their involvement with Service Clubs such as Rotary and Lions, to name but 2. Helping out, where and when help is required, is living a **balanced life** which forms a strong part of the **MDRT Whole Person Concept**. I refer you to the following link on the global MDRT website: <http://ihs.mdrtd.org/wholeperson/index3.cfm> for more details.

MDRT Annual Meeting 2011 - Providing inspiration, ideas and solutions to carry you through the year.



The 2011 Annual Meeting will be held on 5th to 8th June 2011 in Atlanta, Georgia, USA. **Only ONE WEEK to go before the BIG EVENT!**

Attend the 2011 MDRT Annual Meeting which is being held at the Georgia World Congress Center and experience the high-energy, entrepreneurial spirit of the Round Table.

- Learn from the finest minds in the financial services industry.
- Re-energize with motivational and inspirational presentations.
- Exchange ideas with the world's most successful advisors.

Ask anyone who has been to an MDRT meeting and they will tell you how the experience has changed not only their work life, but their interpersonal relationships with friends and family. Only approved MDRT members are eligible to attend the MDRT meeting.

ANZAC NIGHT AT THE ANNUAL MEETING - This year at the MDRT Annual Meeting, MDRT Australia is jointly hosting an ANZAC Night soiree on Monday night 4th June at Max Lager's Wood-Fired Grill & Brewery, Atlanta. This is an opportunity for our attendees to enjoy a night of networking with MDRT friends. For our Sponsor partners Special Guests, it provides an ideal opportunity to strengthen their relationship with the broader MDRT Community as many MDRT officials look forward to the ANZAC Night.

NEW MEMBERS

We make a special welcome to our new members who have joined the MDRT Community this year, namely Christine Brown, Gregory Cook, Brian Kennaugh, Simon Little, Susanne Maas, Ian McDonald, Stephen Perera, Penelope Scardifield, Geoffrey Schubert, Adam Stewart, Michael Waycott, Cameron Bryant, Abby Burns and Prakash Rajpal. Trust me, **you will never regret joining MDRT – The Premier Association of Financial Professionals.**

MDRT Australia wishes to acknowledge and thank our sponsors.

MDRT Australia is proud to be associated with our 4 Gold Sponsors for 2011. These companies are passionate about MDRT, and we urge you to introduce yourselves to their representatives at the various events to learn more about their products and services.



asteron **CommInsure**

AT YOUR FINANCIAL SERVICE®



TOWER
INVESTING IN LIFE

A note from our State Chairs.....

Queensland...

I hope everyone is having a great start to the first half of the year! I am heading off to Atlanta this week for the MDRT Annual Conference. This is always the highlight of my year and am looking forward to seeing old friends and making new ones and of course coming home with more great ideas for business, which will be shared with others from around the world.

I'm looking forward to sharing my experiences at our next quarterly meeting on the 13th July @ Victoria Park Golf Course. We will also be discussing the fee for service model and all the information re FOFA and we will be announcing our speaker whom is currently running this model and how he goes about it. Invitations for the next meeting will be sent out over the coming few weeks – definitely plenty for you to learn from!

Look forward to seeing you all soon;
Best regards, Roy Hall

New South Wales...

Expectations are high for the 26 NSW/ACT members who are heading off over the next 10 days for the Annual Meeting in Atlanta.

Many of those members were in the audience of a well-attended session in Sydney on May 25. ACT member, Peter Graham gave a highly informative insight into how he is using an idea he picked up at last year's Annual Meeting in Vancouver on using the internet as a prospecting tool. Peter shared the methods he's using to direct potential clients to reach out (via his various websites) to him as a financial planning expert. While it's still early days, he's already getting results and they are getting stronger by the month.

Peter was followed by Troy Williams, a 29 year old Tasmanian adviser who has grown his father's 2 man business into a firm employing 16 people and turning over \$2.5 million. Troy covered all the bases on what has worked (& what hasn't), how he keeps the business moving forward and his expectations for the future.

Both sessions finished with generous question times, allowing the audience to gain further insights and specific details of the actual methods employed by Peter & Troy. Following on from the meeting, a get together at the bar gave everyone further opportunity to ask questions of Peter, Troy and other MDRT members.

The next NSW gathering will be an "Ideas from Atlanta" session in late July.

Regards, Guy Mankey

Victoria...

The Victorian MDRT committee had a great area meeting in March where we had Brian Perrin as our keynote presenter.

Our next meeting will be held on July 28th at 3pm at Royal Brighton Yacht Club. The keynote speaker will be Mr Gerard Lowe who runs a very successful Financial Planning business in Mordiallic. Gerard will speak to us about his business and his extremely successful model for attracting Centres of Influence and referrals from them. Other speakers at the meeting will be MDRT members who will be attending this year's MDRT Annual Meeting in Atlanta.

We have 7 members of our Committee attending the meeting and all of us are really looking forward to the experience. We will also have one of our members discussing a very recent claims story that has affected one of his clients and how he was able to assist the client from the start to the finish of the claim.

I hope everyone has a very successful end to the Financial Year and I look forward to seeing you on July 28th at Brighton Yacht Club.

Regards, Ross.Hultgren

South Australia...

Since the last newsletter, we have held a breakfast seminar on March 20th with the theme "Insurance really matters" which 56 registrants attended. Our first guest speaker, Adam Lane from Macquarie Life, spoke about his own life story of when he had a brain tumor, underwent radical surgery from Dr Teo, and how trauma insurance provided capital stability to the family's needs at that time. Our second speaker was Simon Stanton, Claims manager at AMP Life, who ironically was the claims manager with the insurer that Adam had at the time of his crisis. Simon spoke about the need for advisers to be interactive with their clients and the insurer at the time of a claim and how that adds value to your business.

Our next function, scheduled July 27, will focus on the success and value of this year's Annual meeting, as told by some of the members who attended. This will be a great opportunity for prospective MDRT members to hear what benefits can be gained by joining MDRT, so bring along some prospective advisors.

Another breakfast seminar scheduled for September 7, will focus on practice management.

Regards, Richard Campbell

“You're not in this business unless you're into MDRT!”