

MDRT speak – bring one idea home and you pay for your trip!



The Premier Association of
Financial Professionals®

e-news

MDRT Australia

Ph: 1300 833 892

Autumn 2009

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

Can you think of any other profession where you can help someone put their family and their finances in a position for generations to come?

Philip E. Harriman - Maine USA

Excelerate Program - MDRT is looking to run training programs for newer advisers in QLD, NSW & VIC. Our aim is to expose newer advisers to some of the industry icons and fast track their knowledge and understanding. If you would like to nominate any new sponsors or advisers please contact via email australianchairperson@mdrtaustralia.net

MDRT Annual Meeting - The 2009 Annual Meeting will be held on 7th – 11th June 2009, in Indianapolis, Indiana, USA, the nation's 13th largest city. Come network with members, attend industry related sessions, learn the latest trends, and get wowed by more than 80 well-known motivational speakers. Check out the photos below.



Sales Ideas –

When I am trying to ascertain with a client how much risk insurance they need, I say “I would like to deliver 3 cheques to your family if you were no longer with us”.

CHEQUE 1 - FINAL COSTS

CHEQUE 2 - DEBT CLEARANCE

CHEQUE 3 - LIFESTYLE

Ross Hultgren – Geelong Victoria Australia

MDRT Australia acknowledges and thanks our sponsors

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State Updates

Victoria

Since my last report my MDRT committee has met every month and we have been planning our seminars for 2009. We held our first breakfast seminar in February which was well attended by over 50 Financial Planners and the title was Building Better Business with Accountants and the keynote speaker was John Cockle. Our next meeting will be 23rd July commencing at 3pm and finishing with fellowship drinks from 5 till 6pm. The theme of the seminar will be Business Insurances concentrating on Key Man and Business Succession planning. The venue and speakers will be announced shortly, but please keep this date free in your diaries. *Regards, Ross Hultgren*

South Australia

Our AFA Gen X seminar was held on 4th February 2009 in Adelaide to introduce attendees to the world of MDRT on a local level.

The next SA Breakfast Seminar is on 28th May 2009 with an Estate Planning theme followed by Masterclass – Strategic Alliances.

For booking call me on **08 8267 7788**.

Kind regards, John Campbell.

Queensland

Our Breakfast meeting on 5th March we had special guest Wes McMaster, Wes is well known in the financial planning industry throughout Australia. He is highly sought after as a consultant in the financial services industry on issues associated with financial advice and financial advice businesses. He built his own financial planning business and managed it for 16 years. He was also the CEO of two large national financial planning businesses owned by ING. It was very well received to all who were present.

Our next meeting is the 13th May 2008 at 7 am at the Brisbane Club. I would like to see all members attend.

Remember: "It is the job that is never started that takes the longest to finish"

Regards, Roy Hall

NSW

The NSW Seminar held on Friday 3rd April at Maritime Museum Darling Harbour Sydney, hosted special guest Ronnie Muhl. Ronnie has been an adventurer all his life and in 2006 he spent two months on the North Face of Everest, unsuccessful in his bid to become the 10th South African to stand on her summit. He returned to the mountain in 2007 and on 23 May, fulfilled his dream by becoming the 7th South African to summit via the North-east Ridge – this time as leader of the first successful South African team to the North side in which three out of four climbers summited. He is an adventurer, author, athlete, filmmaker, businessman and inspiring speaker both locally and internationally. He is also an entrepreneur, who successfully manages three businesses.

Our local speakers were Russell Collins "Would You like to Increase Your Risk Insurance Production and Kevin Owen "How I am coping in the Financial Service industry in another down market?". The seminar was a big hit and I send a special thanks out to all those who assisted with its success.

Regards, Mathew Gale

2009 Upcoming Events Calendar

13 th May	MDRT QLD Local Meeting	19 th August	MDRT QLD Local Meeting
28 th May	MDRT SA Local Meeting	4 th – 6 th October	AFA National Conference
7 th – 11 th June	MDRT Annual Meeting, Indianapolis, Indiana, USA	7 th – 10 th October	MDRT Top of the Table Meeting, Kauai, Hawaii, USA
23 rd July	MDRT VIC Local Meeting	18 th November	MDRT VIC Local Meeting
21 st – 23 rd July	AFA Local Meetings WA, SA & Tasmania	18 th – 20 th November	FPA National Conference
28 th – 30 th July	AFA Local Meetings QLD, VIC & NSW	25 th November	MDRT QLD Local Meeting

"You're not in this business unless you're into MDRT"