

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



The Premier Association of
Financial Professionals®

MDRT Australia e-news

Spring 2010

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

MDRT gives you the tools to turbo-charge what you want in life, in ALL areas of your life.
Godfrey Phillips, MDRT Australia – New South Wales

A word from our Australian Chair

The AFA Conference which was recently held at Royal Pines Resort on the Gold Coast was once again well represented by MDRT members. At our Booth in the Exhibition Hall, we introduced "Dates with the Greats", where experienced MDRT Members shared their transferrable ideas with the broader Adviser Community, one on one or in a small group. This new concept was taken up by enthusiastic MDRT Members and was well received by the conference attendees.

At the AFA Conference, MDRT hosted a Breakfast Seminar with Anthony Bell, Managing Director of Bell Partners, as the guest speaker. Mr Bell's company, Bell Partners, has been recognised as "The Most Productive Accounting Firm" for 7 consecutive years by Business Review Weekly. We also recognised, long serving members Russell Collins and Stuart Farrell (Immediate Past MDRT Australia Chair) for their long standing commitment to MDRT and the Australian Adviser Community.

MDRT members were well represented as finalists in the AFA Adviser of the Year and AFA Rising Star awards. MDRT would like to congratulate Andrew Shakespeare, a 2 year MDRT Member from Charlestown, New South Wales, who achieved the Rising Star Award. This award is judged on four key areas - Providing Financial Advice, Business Acumen, Community Service and Industry Service.

MDRT Experience 2011 – 24 – 26 February, 2011

The MDRT Experience meeting delivers cutting-edge sales techniques, technical information and motivational concepts and is proven to have helped financial professionals who attend increase their production — and qualify for MDRT membership. You don't have to be a member of MDRT to attend so if you know of someone who would benefit from attending this meeting, why not tell them about it and give them some encouragement to attend - after all, it can only help them!



Next year's MDRT Annual Meeting (June 5 – 8, 2011) in Atlanta, Georgia USA is on track to be as inspirational, educational, and fun as this year's meeting was. Give yourself gift and attend next year's meeting – it will give you ideas and solutions for your business and personal life that will carry you through the year. To ensure your eligibility to attend, send your MDRT membership renewal form in early. For more information on the meetings and membership renewal, visit www.mdrtd.org.

MDRT Australia wishes to acknowledge and thank our sponsors.



CommInsure



A note from our State Chairs.....

Queensland...

In the last Quarter I attended the Whole Person committee in Mumbai (Bombay) India. The committee was to further develop the process of becoming a Whole Person, keeping the balance between work & life stable. This concept has been around for years, but what we want is a process for our MDRT members to share with them and assist them to achieve this whole person status.

With all the demands for your time and attention it is easy for people to loose touch with other equally important aspects of their life. There are many areas of need and advisers need to explore their options to be a more complete Whole Person. These areas include Relationship, Health, Education, Career, Community Service, Financial and Spiritual.

We are looking for everyone to get involved and complete an assessment on the MDRT web page as a starting point. Then we can assist them to put together an action plan, and review. Ask yourself this - "When did you last ask how you can be a more loving spouse/partner/father/mother etc?" You will be surprised to find out the answer. All the best for the Christmas period and I can't wait for next year.

Warmest regards, Roy Hall

ACT

We are back on track after a brief absence and I am pleased to advise that the first MDRT Local Area Meeting will be held in January, 2011. Invitations for this meeting will be sent out in late December/early January. This meeting will be an opportunity for members and non-members to hear about developments within MDRT in Australia and overseas. In particular, the new qualifications will be explained in detail.

If you have any questions regarding this meeting, please contact me at peter@lifestyleadvisers.com.au.

With regards, Peter Graham

Victoria...

Another AFA Conference has come and gone. We had our usual MDRT booth where we had our inaugural 'Dates with the Greats' sessions. The concept was simple – MDRT members made themselves available to discuss and share their ideas with the Adviser Community at large. The MDRT hosted Breakfast Seminar was also a great success at the conference, with guest speaker Anthony Bell from Bell Partners, being a well received.

With all the activity and organising involved with going to the AFA Conference, we still managed to squeeze in a MDRT Local Meeting at the Brighton Yacht Club on 11 November. With guest speaker Roy Hall and 64 attendees, we have finished our year on a high note.

Regards, Ross Hultgren

South Australia...

This quarter started off with our MDRT Local Meeting taking place late September with outstanding guest speakers Jeffrey Scott from CommInsure and Sue Gibbs who spoke on her experience as a first time attendee at the Annual Meeting in Vancouver.

This meeting was followed by the AFA Conference in late October where I and other committee members assisted in launching our very successful 'Dates with the Greats' concept at our booth. Here, attendees at the conference had open access to MDRT members who shared and discussed sales ideas and the whole person concept that is MDRT.

To complete a very busy year, we finished early with an MDRT Interest Meeting held in early November, which was generously hosted by Mr D'Arcy Evans of Zurich.

We would like to take this opportunity to wish all of you all a fantastic, happy and safe Christmas.

Merry 
 *Christmas*

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