

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



MDRT Australia E-news 2012

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

The Premier Association of
Financial Professionals®

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 difference between success and failure is that success means getting up just one more time than you fall down.

William Van Winkle, MDRT USA – New Jersey

A word from our Australian Chair

Already we are 4 months into the year and what a year it has been.

MDRT Partners 2012

This year MDRT has 5 Sponsors. We welcome back AIA, Asteron, CommInsure and TAL as Gold Sponsors and would like to welcome Zurich as a Platinum sponsor. We are pleased to be partnering with these companies.

MDRT Roadshow 2012

In February, MDRT hosted the very successful MDRT Australia Roadshow that visited Perth, Adelaide, Melbourne, Sydney and Brisbane. In all, there were 654 attendees at the 5 venues to hear Mike Morrow, J Marvin Walker and Sol Hicks who presented in Perth, Adelaide, Melbourne and Sydney. Australia's Russell Collins replaced Sol Hicks (who had to fly out of Sydney to meet an MDRT commitment in England) in Brisbane.

The speakers' presentations were extremely well received and as at any MDRT Annual Meeting, there were moments of laughter, tears and time for reflection. All speakers were generous with their time and very keen to speak with advisers in Australia and to learn about our business models.

MDRT Annual Meeting 2012 - Providing inspiration, ideas and solutions to carry you through the year.



The MDRT Annual Meeting in Anaheim will be held 10 – 13 June 2012. Those attending will experience the high-energy, entrepreneurial spirit of the Round Table and will:

- 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 advisers.

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, so make sure your membership application has been sent to MDRT as soon as possible. For more information, visit www.mdr.org.

On a sadder note, it is with regret that I advise that Qualifying and Life member Peter Moyle of Adelaide, South Australia died on Friday 2 March 2012, aged 60. Peter was a member for 27 years and also gained 7 Court of the Table, and 7 Top of the Table qualifications. Without doubt, Peter was a leader in the Financial Advisory industry in Australia and the world and he recognised his responsibility to give back to the industry that had been so good to him. Peter was always willing to help other advisers, mentor newer advisers and share the successful ideas that he had developed.

MDRT Australia wishes to acknowledge and thank our sponsors.



Platinum Sponsor



CommInsure



Gold Sponsors

A note from our State Chairs.....

Queensland...

Queensland has started the year by sharing in the "MDRT Experience". Our first breakfast meeting for the year saw special attendees including Mickey and Minnie Mouse – rounding up the enthusiasm for the year ahead. We were lucky enough to have Keith Abraham share his talk on his way to the MDRT meeting in Bangkok.

Jordan Hawke reminded us of why we do what we do with his recount of a client knowing they don't have long to live, and facing the reality of their insurances and the short time they have. This was a heart wrenching story that reinvigorated us to make sure everyone we know is fully protected.

Three weeks later we came back together...with increased numbers....to celebrate the Roadshow event. The feedback sheets, emails and phone calls after the event demonstrated that it was an afternoon well spent. It was indeed the event not to be missed and again I thank all those who assisted in bringing this together.

A reminder...the next breakfast meeting will be fresh on the heels of our Anaheim meeting - ..see you in early July

Regards, Susan Paterson – QLD Chair

New South Wales...

MDRT was on everyone's lips following the Sydney Roadshow. The enthusiastic crowd of over 270 laughed and cried (& and even sang along with Sol) while taking home some unique marketing ideas and positive affirmation about why it's important we're all in this business.

At last year's annual meeting in Atlanta, ex NBA star, Walter Bond, reminded the 7,500 in attendance us that communication isn't the key to good relationships. Connecting is what's important. This event served as a reminder that the international element of MDRT allows it to connect in a way no other organisation can. It educates, provokes and inspires. Its members have learned to share and care.

MDRT takes good advisers and allows them to rub shoulders with, and in time become, the best our industry has to offer. To quote Godfrey Phillips, "It's the Olympics of our industry."

Following the Roadshow, over 70 Sydney advisers expressed interest in investing in their futures and becoming members. I hope to see all of them in Anaheim in June.

Finally, thanks to the MDRT sponsors and my committee for the support. This fantastic event couldn't have happened without them.

Guy Mankey – NSW Chair

Victoria...

Victoria has started the year with an almighty MDRT roar!!

Months of planning went into our National Road Show that was held here in South Wharf, Melbourne with many advisers attending and the feedback has been outstanding. Our 3 speakers Michael, J Marvin & Sol were warmly welcomed and provided very different topics to our member advisers, product sponsors and their guests. We had some great positive feedback in particular how personalised the panel sessions were, the excitement in the room and buzz that was created was another with advisers leaving more inspired than ever

Some other feedback was a great job overall to the team on the day, a top day was had by all with plenty of out takes to be used straight away, an excellent venue and the speakers were great all round. Some first time attendees absolutely loved it and was great to hear from some international speakers, more panel sessions in the future as these were very insightful was heard consistently across the feedback forms. We have since had enquiries for new members to join and this shows given the number of new members we have had register and also to attend the 2012 conference in Anaheim

We are aiming to hold our next area meeting in July/August (dates and speakers to be confirmed) post Anaheim which believe it or not kicks off in only 6 weeks from now!

I would like to personally thank my staff here at Finstyle for their assistance and my Victorian Committee for their assistance with the Roadshow in the lead up to and on the day in particular and that it was a great success and could not have pulled it off without you all

Bring on Anaheim 2012 J and please keep an eye out for our July/August area meeting, will be an afternoon session

Regards – Brad Isaac VIC Chair

South Australia...

With 85 attendees (lower than hoped but 2 PD Days hampered our numbers) we had a great afternoon of intellectual wealth from 3 different but fantastic speakers.

Albeit we had a great mix of delegates attending between old and new advisers, we were more pleased that a large percentage of our audience were first time attendees to a MDRT function and a high level of interest in knowing more about MDRT was generated, which we will be following through with to develop that interest further.

The buzz and feedback since has also been very positive with comments ranging from "Bring back the Yanks - Excellent" to "My first time - fantastic". Michael generated further sales to his program as a result and our sponsoring partners and particularly Zurich have been very excited about what MDRT can offer advisers as we move forward.

Adelaide also provided a rest day for our guests which after a quite intermit dinner on Tuesday night at Australian Chair - John Campbell's home we spent the day with yours truly as bus tour guide showing our guests the lovely city of Adelaide and a trip to the Southern Vales where we had a lovely lunch at Woodstock winery before heading back to catch the plane via a scenic route through the Adelaide Hills.

I would also like to thank all those who put in a lot hard work behind the scenes in making all this come together. I know that John and Stuart spent some considerable hours fine-tuning this event and Susan was a fantastic assistance in ensuring this all went smoothly. Our role was small in comparison but without the help of my SA Committee our end of the organising also would not have been possible and I thank my committee also for their assistance.

With regards, Richard Campbell – SA Chair.

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

CALENDAR OF EVENTS

MAY

10th - MDRT South Australia – breakfast meeting

JUNE

10th – 13th - MDRT Annual Meeting – Anaheim Convention Centre, California USA

JULY

4th (tentative date) – MDRT NSW
11th – MDRT Queensland
19th – MDRT South Australia
24th (tentative date) – MDRT Victoria

AUGUST

1st (tentative date) – MDRT ACT
14th – MDRT Western Australia

SEPTEMBER

13th – MDRT South Australia – breakfast meeting
20th (tentative date) – MDRT NSW

OCTOBER

10th – 13th – MDRT Top of the Table Meeting – Amelia Island, Florida USA

NOVEMBER

5th – MDRT South Australia – interest meeting

FEBRUARY 2013

21st – 23rd – MDRT Experience – Hyderabad, India

For more details check our calendar at www.mdrtaustralia.net
or
contact your State Chair