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**MDRT**

The Premier Association of  
Financial Professionals®

## MDRT Australia

### E-newsletter

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## Autumn 2013

**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

Life is no brief candle to me. It is a sort of splendid torch which I have got a hold of for the moment, and I want to make it burn as brightly as possible before handing it on to future generations.

*George Bernard Shaw.*

### A word from our Australian Chair ....

This year to date, MDRT Australia has exceeded membership numbers from any other year - with more members still joining. Research undertaken by Zurich has shown that the awareness of MDRT within our industry is 80%. Also the initiative taken by CommInsure who offered a scholarship of up to 30 industry members, not only boosted our membership numbers this year, but also increased awareness.

I would also like to extend a special welcome to our new members who joined our community this year - Eric Bohl, Matthew Brown, Tim Farr, Patrick Forrester, Nicholas Gunner, Kye Harris, Tenielle Hedley, Sue-Ellen Hogan, Kenny James, Nathan Lewis, Helen Lloyd, Andrew Maciejewski, Rowena McGrath, Peter Nonnenmacher, Loretta O'Brien, Ashley Pattinson, Mark Rando, Rob Rassool, Rosanna Rossi, Ian Satill, Dominique Schuh, Kabindra Shrestha, and Manish Sundarjee. As members, these individuals have taken the step towards a long and successful career.

#### MDRT ANNUAL MEETING – Connect. Explore. Celebrate.

The Annual Meeting is being held in Philadelphia this year from June 9-12. This year we have 5 Australians presenting in focus sessions, which is a great recognition of the talent within our industry. And we also have our largest contingent of Australian attendees going – 104, with more registrations still to be processed. Pre-Meeting registration is still available for those eligible through to June 7. If you are interested in attending and are looking for more information go to [www.mdr.org](http://www.mdr.org) and click onto the meetings tab.

#### ANZAC Event



The Annual Meeting would not be complete without our traditional ANZAC Event held jointly with our friends from MDRT New Zealand. This year our event will be held on Monday night 10<sup>th</sup> June, at the Field House, PA Convention Centre. This is an ideal opportunity for our attendees to enjoy an evening of fellowship with MDRT friends. For our Sponsor partners, it provides an opportunity to strengthen their relationship with the broader MDRT Community.



### MDRT Australia wishes to acknowledge and thank our sponsors.

**These companies are passionate about MDRT and we urge you to introduce yourselves to their representative at the various events to learn more about their products and services.**



Platinum Sponsor



**CommInsure**



**TAL**

Gold Sponsors

## A note from our State Chairs.....

### Queensland...

Adviser stories have been the theme for MDRT QLD meetings this year. We welcomed Guy Mankey and Phil and Joel Campbell, from Sydney, to share their stories of career successes, sales strategies and building businesses. This was a very well received breakfast meeting with strong feedback from the 100 attendees. As a follow on, we will be presenting stories from Angus Mac Queen and Brad Isaac, from Victoria, at our May 22 meeting. With seating still available, you will have the chance to experience an MDRT focus session - this is a great opportunity to enjoy an Annual Meeting session at a local venue!

Regards, Sue Paterson

### New South Wales...

This has been quite a busy and worthwhile period in the lead up to the Philadelphia MDRT meeting.

Our main event was the NSW MDRT meeting in April – “From the Heart... Advisers Stories”. Phil & Joel Campbell did a valuable presentation on the building of their business, their sales strategies, the challenges they faced with ASIC and the success of their succession planning. Our special guest - Neville Brown – gave us a perspective from a client’s perspective on what a critical role our industry plays. Neville told the story of his diagnosis of multiple sclerosis, the life changing consequences as a result, and how through having received valuable financial advice, risk insurance protection was there to ensure his family’s financial security.

There has also been strong interest from advisers in becoming MDRT members. We have answered questions, outlined the benefits of MDRT and helped new members through the registration process. As a culmination of the membership period, MDRT NSW - through Bev Carlyon and Penny Scardifield - organised a lunch for new members who will be attending their first MDRT Annual Meeting in Philadelphia. Bev provided some great “insider” tips for getting the best out of the annual meeting.

CommInsure have provided excellent support in encouraging their advisers to become MDRT members. Next week in Sydney they are hosting a lunch to celebrate and recognise advisers who have qualified for MDRT membership and will be attending their first Annual Meeting this year.

Regards, Brad Flick

### Victoria...

With over 100 attendees, MDRT VIC held another successful area meeting on 18<sup>th</sup> April at the Brighton Yacht Club. Angus McQueen and Kingsley Oldfield shared insights from their business McQueen Wealth Management – entitled “Transitioning your business from the Old world to the New”. Our next local area meeting will be in late July and we will be announcing speakers in due course, as we always have a first time attendee to the Annual Meeting speak about their experience.

We are also holding a 1<sup>st</sup> time Annual Meeting attendees luncheon at CommInsure on the 29<sup>th</sup> May, to introduce the VIC Committee and all those attending from Victoria. Having a meet and greet prior to everyone flying over to the USA, following Sydney’s lead, is a fantastic concept and helps first timers enjoy the Annual Meeting to the fullest. CommInsure will be hosting the luncheon at their offices and their successful applicants from their sponsorship program will also be in attendance.

With regards, Brad Isaac

### South Australia...

During March in SA we held “MDRT, The Greatest Show on Earth”. The breakfast seminar was a fantastic introduction to the upcoming Annual Meeting in Philadelphia. With just over 90 attendees, Tony Bongiorno mesmerised the crowd with his experience of over 37 years as MDRT member. He will be presenting to all those lucky enough to attend the Annual Meeting in June.

Megan Garvan, the Claims Retail Manager at TAL, took us through the mind and day of a Claims Case Management Specialist. Her insight and knowledge was a welcome addition to our day.

We received positive feedback on both speakers with comments like "Bongiorno speaks volumes!" and "Great as usual", with many expressions of interest in both joining the MDRT committee and making the trip over to Philadelphia.

It was great to see many new faces in the crowd at our latest seminar, with the continued support of our sponsor making the day a success.

Warm regards, Adam McCann – SA Chair.

## CALENDAR OF EVENTS

### MAY

22<sup>nd</sup> – MDRT Queensland Local Meeting

### JUNE

9<sup>th</sup> – 12<sup>th</sup> – MDRT Annual Meeting, Pennsylvania Convention Centre, 1101 Arch St, Philadelphia, Pennsylvania.



Photos of the Pennsylvania Convention Centre



Philadelphia – the city of brotherly love.

### JULY

25<sup>th</sup> – MDRT South Australia Local Meeting (tentative date)

MDRT Victoria Local Meeting

26<sup>th</sup> – MDRT NSW Local Meeting (tentative date)

### AUGUST

7<sup>th</sup> – MDRT Queensland Local Meeting

15<sup>th</sup> – MDRT Western Australia Local Meeting

### OCTOBER

11<sup>th</sup> – MDRT NSW Local Meeting (tentative date)

16<sup>th</sup> – MDRT ACT Local Meeting (tentative date)

17<sup>th</sup> – MDRT South Australia Local Meeting (tentative date)

MDRT Victoria Local Meeting

### NOVEMBER

20<sup>th</sup> – MDRT Queensland Local Meeting

### DECEMBER

6<sup>th</sup> – MDRT NSW Local Meeting (tentative date)

### FEBRUARY 2014

13<sup>th</sup>-15<sup>th</sup> – MDRT Experience, Kuala Lumpur, Malaysia – Kuala Lumpur Convention Centre (KLCC)



Kuala Lumpur Convention Centre

**MDRT Australia Roadshow – Perth, Adelaide, Melbourne, Sydney and Brisbane (February 2014 dates to be announced)**

For more details, check out our calendar at [www.mdrtaustralia.net](http://www.mdrtaustralia.net) or contact your MDRT State Chair.

For more information about MDRT in general, go to [www.mdr.org](http://www.mdr.org) and [www.roundthetable.org](http://www.roundthetable.org).

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