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**MDRT**

The Premier Association of  
Financial Professionals®

## MDRT Australia

### E-newsletter

### Spring 2013

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**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 highest reward for a person's toil is not what they get for it, but what they become by it." - John Ruskin*

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

This quarter has been full of activity on the MDRT Calendar. In addition to our usual local meetings hosted by each State, we had the opportunity to host special seminars in Melbourne and Sydney with international referrals coach, Bill Cates. Additionally, Bill was also our special guest speaker at the MDRT/AFA GenX breakfast at this year's AFA Conference on the Gold Coast. Feedback from all those attending one of Bill's sessions was very positive, with the content being exceptional.

#### AFA Conference

As mentioned above, MDRT co-hosted our special Bill Cates breakfast with AFA GenX. This year we also had mini breakout focus sessions at our booth during the tea and lunch breaks, as well as an annual competition where the prize was either two registrations to next year's MDRT Experience in Kuala Lumpur, Malaysia or one registration to the 2014 MDRT Annual Meeting in Toronto, Canada. I would like to extend my congratulations to our competition winner, Wayne Clarkson from WA.



I would also like to thank our presenters who did such a wonderful job with their mini focus sessions at our ConneXion Zone booth and to all those delegates who visited our booth and entered our competition.

#### 2014 MDRT Roadshow

Final details for our Roadshow are currently underway. This event is looking to be our best yet with three international speakers confirmed to present straight from the MDRT Experience in Kuala Lumpur – Sandro Forte, Helen Jenkins and Sarah Kaelberer, with our MDRT President Michelle Hoesley joining them for the Brisbane and Sydney legs of the Roadshow. This time we have also added workshops and focus sessions on the last leg in Sydney, with Sandro Forte presenting two morning workshops. We end the two day event in Sydney with the MDRT focus sessions being presented by some of Australia's best advisors, Russell Collins, Guy Mankey, Susan Paterson, Godfrey Phillips and Ross Vanderwolf. Details on these events and registration forms can be found on our website [www.mdrtaustralia.net](http://www.mdrtaustralia.net).



*On behalf of the MDRT Australia Committee,  
I would like to wish you all  
a safe and harmonious Christmas,  
and a prosperous New Year.*

*Ross Hultgren, MDRT Australia Chair.*

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



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

### Queensland...

It has been very busy here in Qld with another successful meeting in August and organising the MDRT Connexion Zone stand and breakfast at the recent AFA Conference at the Royal Pines, Gold coast. At our ConneXion Zone stand, we ran a series of mini presentations with some of our industry greats sharing the things they have learnt from MDRT over the years that made a difference to their business. I would like to thank those speakers - Russell Collins, Stuart Farrell, Vicki Writer, Adam McCann, Ross Hultgren, Gino Saggiomo and Travis Mclean, for taking the time to do this for us. We were also lucky enough to secure a great speaker in Bill Cates, known as the Referral Coach. He gave an excellent presentation to 150 guests at the MDRT/AFA GeneX sponsored breakfast at the conference. All guests would have benefited from his tips and ideas on how to successfully ask for referrals.

In the mad rush before Christmas, we will be hosting a joint Christmas meeting with the AFA QLD and a date and location will be confirmed shortly. I hope you all are having a strong finish to the year.

Best wishes, PJ Byrne

### New South Wales...

Our "The Very Best of Philadelphia" September meeting had Kevin Goss, Head of Commlnsure, providing a perspective on the value of MDRT membership for both the adviser and Commlnsure. Kevin also talked about the Commlnsure initiated Scholarship Program, which was developed to assist advisers to become involved in MDRT and attend their first Annual Meeting in Philadelphia this year. Also presenting was Tony Bongiorno with his MDRT Annual Meeting focus session talk, which encompassed his personal story and the tips he learned from the very best speakers at MDRT meetings over the past 45 years in the financial advice industry. Both speakers' presentations were excellent, with very positive feedback from those who attended.

Following on from our September meeting, we were fortunate to have Bill Cates – The Referral Coach, present his seminar "Grow Your Business With Referrals and Personal Introductions". We had a fantastic turnout for this special event, with unanimous excellent feedback from guests, confirming Bill's ideas provided real value to people's advice businesses.

As the year draws to a close, our focus is on assisting advisers who are interested to become involved in MDRT with the membership application process and to also remind existing Members to think about getting their details together for upcoming MDRT membership renewals. A special meeting will be held in December which will focus on the value gained from becoming an MDRT member.

Regards, Brad Flick

### Victoria...

MDRT Victoria has finished 2013 with its biggest turnout ever to a local area meeting!..125 advisers from Victoria wide descended on the Royal Brighton Yacht club to hear Bill Cates speak. Bills presentation "Grow your business with referrals and personal introductions" not only entertained the attendees for well over an hour and half; but his highly interactive presentation touted a mixture of easy to implement ideas and strategies to build a practice solely fuelled by referrals of your idea calibre clients. Everyone left motivated with many ideas to implement in their businesses some of which we hear are already coming to fruition.

My committee and I would like to thank our sponsors for the amazing support we have received this year and we look forward to our continued relationship with MDRT VIC providing even more valuable sessions for our advisers as we head into 2014

Merry Xmas Everyone, Brad Isaac

### South Australia...

During August, we held another successful local meeting with Scott Kirkwood of Bernie Lewis and Jeffrey Scott from Commlnsure. Scott spoke on the importance of living your life for you not just working to leave a legacy for those who will come after you when you retire. Jeffery addressed the issues surrounding FOFA and helped to demystify concerns.

We are currently preparing for our December Breakfast Seminar just in time for the festive season. We have secured Elise Sanders from AIA, to discuss supporting your business through cost effective and simple ideas that can be implemented quickly at the time of claim, We also have Madeleine Shaw from The Resilience Institute in Sydney, who will be helping attendees to perfect the art of Mastering Stress. We look forward to seeing many new faces in attendance.

Regards, Adam McCann

# CALENDAR OF EVENTS

## DECEMBER

4<sup>TH</sup> – SA Local Meeting  
TBA – QLD Local Meeting  
TBA – NSW Local Meeting

## FEBRUARY 2014

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



## MDRT Australia Roadshow – 17th – 24th



PERTH – Monday 17<sup>TH</sup>



ADELAIDE – Tuesday 18<sup>th</sup>



MELBOURNE – Thursday 20<sup>th</sup>



BRISBANE – Friday 21<sup>st</sup>



SYDNEY – 24<sup>th</sup> (Workshops & Focus Sessions – 24<sup>th</sup> & 25<sup>th</sup>)

## JUNE



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

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