



INSPIRING GREATNESS

FPA Professionals CONGRESS



FINANCIAL PLANNING
ASSOCIATION of AUSTRALIA

PROFESSIONAL PLANNER
INSPIRING ADVICE

ADELAIDE 19-21 NOVEMBER 2014

ISSUE 1 2 3



Matthew Rowe

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Inspiring greatness with the professional in mind

Under the theme "Inspiring Greatness," FPA Professionals Congress 2014 officially opens today in the Adelaide Convention Centre.

Bringing the professional financial planning community together to share ideas, not only from Australia but globally, is a key aim of the event, says Matthew Rowe, chairman of the FPA 2014 organising committee.

"In building the FPA Congress, it's always been with the practitioner in mind," Rowe says.

"And in doing this, we focus on the technical aspects they need to know

about as professionals."

The program is divided into four streams running concurrently over the two days, with speakers presenting on topics in the subject areas of technical, leadership, personal development and best practice.

Rowe explains that presenters are a combination of independent experts as well as subject matter experts and practitioners. "They will discuss how to develop you as a leader and a business, but also in terms of the broader profession."

This is the second year the event has been structured as a congress instead of a conference format, a change that was introduced in 2013.



WE DECIDED IT WAS REALLY TIME TO FOCUS ON WHAT'S IMPORTANT TO THE INDIVIDUAL PROFESSIONAL PRACTITIONER, SO WE COMPLETELY REBUILT THE CONGRESS FROM THE GROUND UP

"We decided it was really time to focus on what's important to the individual professional practitioner, so we completely rebuilt the congress from the ground up," Rowe says.

"We try to take what we think are the key elements of the last year, with the last 12 months having seen absolutely critical change within the industry," Rowe says.

Separating product and advice

One of these is the ongoing discussion about the separation of product and advice (SoPA), which Rowe says is a key theme.

There are also panel sessions with leaders in the advice profession, with topics such as "how do you meet the best interests duty in life insurance?"

Jeff Morris, the Commonwealth Bank whistleblower who helped uncover the issues of adviser malpractice at Commonwealth Financial Planning, will also sit on a panel with Peter Bobbin, head of personal legal services, Rockwell Olivier.

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Mark Rantall

Driving member engagement and collaboration

FPA Professionals Congress 2014 is an opportunity for professional financial planners to come together to re-engage with their peers, to support one another and be proud of the work they do for clients.

According to Mark Rantall, chief executive officer of the Financial Planning Association (FPA), the event enables members "to learn and engage with experts across a number of different fields, with a view to enhancing their self development."

"It's part of their member engagement program, with the real benefits out of attending something like this clearly being the educational component and the content in the program."

He also highlights the importance of the congress's informal learning and networking components.

"These will enable attendees to participate in discussion, counselling and coaching with their peers."

The exhibition space has been designed to facilitate these less formal discussions, including lounge areas, and a dedicated 'meet the speakers' area.

"An overall environment that allows for discussion and interaction is something we've been very focused on this year, and on having a number of different forums to enable that to happen," Rantall says.

Other member-focused initiatives also feature in FPA Congress 2014. Rantall

Kendall steps up to take the chair

Four years on the board of the Financial Planning Association has prepared Neil Kendall for the challenges ahead, and will ensure a smooth transition as Matthew Rowe bows out.

Neil Kendall formally succeeds Matthew Rowe as chair of the FPA during the FPA Professionals Congress 2014. While the face of the chair will change, Kendall insists that the association, and its priorities, will remain unaltered.

"We will continue on the professional journey," Kendall says.

"There are already 10,000 of us who

are part of this professional community, and our job is to continue to grow that professional community.

"And we have to remember that is this about people, and not lose sight of that among all the other things that go on – and our job is to make a meaningful, positive difference in the lives of our clients."

"One thing I'd like members to engage with is that the FPA is 'we'. We 10,000



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people who go out there every day and do financial planning. I am one of them; I have a degree qualification; I am a Certified Financial Planner; those sorts of things.

"But it's about the whole community of 10,000 people who are, in the main, degree-qualified, Certified Financial Planners as well. So I do not think my credentials are necessarily that important in the flavour of where the FPA is going."

Kendall's firm, the Brisbane-based Tupooffs, is an FPA Professional Practice, and is a winner of the FPA Best Practice awards in both the CFP and Associate Financial Planner (AFP) categories. It holds its own Australian financial services licence.

Kendall says that after four years on the board both he and his business are prepared to deal with the challenges that lie ahead.



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refers to a breakfast for the chapter chairs from each Australian state and territory, along with a breakfast event themed around women in finance.

"The program content is very modern and contemporary, and this should allow members to engage and collaborate on not only building better businesses, but on building better advice practices," Rantall says.

"This event has been built by practitioners, for practitioners," as opposed to advisers that may be more product-focused, he adds.

A key session Rantall highlights will be held on the opening morning, when he will be on stage interviewing a panel comprising television personality Ray Martin, author Tara Moss, educational leader Jihad Dib and publishing identity Ita Buttrose.

Referencing the FPA Congress theme of 'Inspiring Greatness,' each will discuss with Rantall what greatness means to them personally.



I BELIEVE
IT WILL BE
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"That's almost a program in its own right. It's going to be spectacular, if our interviews with them in the lead up are any indication.

"I believe it will be probably one of the most inspiring sessions you'll ever go to, with the caliber of those people all in the one session...I'm really excited by that, and it's a first for us."

Rantall also explains that publicly recognising the achievements of FPA members is an important focus of FPA Congress 2014.

During the event, select members of the FPA's professional designations of Certified Financial Planner and Associate Financial Planner will be recognised for their efforts. The Future2 Community Service award is also being presented to members who have made exceptional contributions to their communities.

These will be awarded during ceremonies held after the plenary sessions on the Wednesday, Thursday and Friday, respectively. ■



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"They'll be talking about a range of subjects around what it means to be a whistleblower, but also a legal framework discussion about ASIC's whistleblower protection measures introduced recently," Rowe says.

Along with sessions around best interests and education, they will address issues around what the adviser of the future may look like.

Best practice issues will also feature, including how to bring on graduates and career changers, with case studies of how some leading firms are doing this.

In line with the FPA's lobbying for higher standards of financial adviser education and ongoing training, conference attendees earn Continuing Professional Development (CPD) points.

"There's a very heavy content allocation toward education, and 32 continuing professional development (CPD) points on offer, the highest ever for the event," Rowe says.

"We've tried to stay away from topics that relate to specific business models, and focus on what we think are subjects that any professional would find relevant.

"This is about transcending the argument of business models and independence, and focusing on the core that is the financial planning profession, because good advice should transcend any particular business model." ■



Neil Kendall

"The level of professional staff we have [at Tupicoffs] who are degree-qualified CFPs, or on that pathway, enables me not to have to be at the forefront of everything," he says.

"I've spent five years doing some professional education, and that's involved a lot of travel overseas. One of the sacrifices for me in stepping up to this role is that I've had to stop doing that and say, well, where are my priorities? That's all about self-education; this is about continuing to build a profession. It's a nobler cause, and so I've stopped that travel and that study so I can put the time an effort into doing this."

Kendall says he has always been driven by a passion to help people. He says that passion, shared by others, is what underpins the development of a profession.

"Professionalism is packaging that up, all those people who have a similar view," he says.

"Individually, what you've got is a loyalist or an enthusiast, but collectively you've got a profession. So bringing it together is how we get onto this whole field of 'professional community'.

"The level of education, knowledge and skills that you need to build in a profession is much higher.

"As a profession you have to step up that standard and say, OK, I have a desire to help people, and I now have the knowledge and the ability and the training to support that desire." ■



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Welcome

Ladies and gentlemen, welcome to Adelaide and to the FPA Professionals Congress 2014. Believe it or not, it's 17 years since the FPA last held its annual event here. A lot has changed since then; and a lot is happening over the next couple of days. Daily News and Final Word will be covering the highlights for your reading pleasure.

MEET THE SPEAKERS

You'll be able to find many of the Congress's key speakers – including Jihab Dib, Michael McQueen and Avril Henry – at the Meet the Speakers stand, located in the exhibition hall. Make sure you get along and have a chat to them.

Social media and competitions

Throughout the Congress there will be extensive social media activities and great competitions taking place. Final Word will, as usual, be conducting a comprehensive assessment of the competition field – and the prizes on offer. But here's a few things you can get involved in right away:

- Meet the FPA Social Team at the Social Hub and find out how to get connected. You can also enter the Congress Instagram competition by revealing *What Inspires you about advice?* The best answer wins an iPad Mini. To enter, go and see the crew at the Social Hub.
- At the FPA/Future2 Stand you can find out how to enter the fun and easy Twitter guessing competition, and be in with a chance of winning a Go-Pro.
- Platinum Asset Management – appropriately, the Platinum Sponsor of the Congress – is running a stock picking competition. More details on how to enter, and the competition prizes, are available at the Platinum stand.




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Cycling into the Welcome Drinks

The Future2 Wheel Classic is the Future2 Foundation's annual flagship fundraiser. Now in its fifth year, the Wheel Classic challenges financial planning professionals and their friends to test their stamina while raising money to transform the lives of disadvantaged young Australians. It is a challenging 1050 km ride from Melbourne to Adelaide, which started on November 13.

One of the riders taking part this year was the FPA's general manager of policy and conduct, Dante De Gori. The riders arrived at the Congress yesterday in time for the welcome drinks – after a lazy 57km ride in from Strathalbyn. Final Word salutes their determination to complete this arduous trek in the face of adversity posed by both the physical challenge and the lycra.

Keep an eye out over the next couple of days for additional Future2 fundraising activities – and get involved. 

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