



08:45AM INTRODUCTION FROM THE CHAIR

Michael Magee, National Partnerships Manager, Momentum Media

08:50AM WELCOME FROM OUR PRINCIPAL PARTNER

9:00AM - 10:30AM EFFECTIVE PLANNING: YOUR ESSENTIAL BLUEPRINT FOR THE FIRST 18 MONTHS

This practical session will outline what new brokers can expect to confront in the first two years of their journey and equip them with the fundamentals to steer you on a pathway toward a successful, sustainable and valuable business. It will cover:

- The five must-haves for new brokers
- Critical challenges and success factors
- Goal setting and a process for continued improvement
- Managing your business growth and development
- How to identify 'quick wins' through alternative financial products and/or partner alliances

SPEAKER: Stuart Donaldson, Founder, Banyan Co

10:30AM - 10:50AM NEW BROKER HOT SEAT: SURVIVING YOUR FIRST TWO YEARS

In this candid session, you'll hear real-world advice from established brokers about what it takes to make it through the first two years of broking, including:

- What NOT to do
- Where brokers can source leads from
- How to overcome a lack of commission in the early days
- Overcoming challenges to create more sales opportunities
- The importance of sticking with it

SPEAKERS: TBC

10:50AM - 11:20AM MORNING TEA

11:20AM - 12:05PM BE MY BROKER FOR LIFE

Having used eight brokers and multiple lenders to secure finance for her 10 property purchases, Deena provides some valuable insights from the perspective of a client and her tips on becoming a 'broker for life' and keeping your 'clients for life' too.

In this session, learn:

- Proven strategies to FIND clients
- Best practice on how to ENGAGE clients
- Why you should be their broker
- The secrets to winning referrals and keeping clients loyal

SPEAKER: Deena Janes, Managing Director,
Your Client Matters

12:05PM - 12:25PM MARKETING FUNDAMENTALS

The prospect of marketing your business can be overwhelming, particularly when you are operating on a shoestring budget.

In this session, The Adviser presents exclusive broker research that reveals grassroots marketing tips and strategies that actually work in practice.

SPEAKER: James Mitchell, Managing Editor, The Adviser

12:25PM - 1:05PM PANEL: ESSENTIAL TECH TOOLS TO HELP IMPROVE EFFICIENCIES AND INCREASE OUTPUT

As a new broker, leveraging the right technology is essential in helping to improve business processes and effectively service your clients. Understanding the changing demands of your customers and being agile and innovative enough to meet them is critical to success in today's industry.

This session will help you:

- Identify the best solutions and tools available that will help you succeed
- Prepare your business for the next wave of technological advances

PANEL: TBC

1:05PM - 2:05PM LUNCH

2:05PM - 2:40PM THE SECRET TO WINNING BUSINESS TODAY

Creating success in broking requires drive, discipline and a significant investment of time in prospecting and building your client base from day one.

In this session, understand how to master the fundamentals of selling:

- Why it's about relationships

- How to structure your day to get the most out of it
- Balancing prospecting with excellent customer service
- Building referral partnerships

SPEAKER: Glen Coutinho, Director/Auctioneer/Licensed Estate Agent, RT Edgar Boroondara

2:40PM - 3:00PM NEW BROKER HOT SEAT: MAKING THE SWITCH TO MORTGAGE BROKING

In this session, find out what it's like to make the switch to broking, including insights on how to:

- Gain your own competitive advantage
- Build a strong client base
- Identify key turning points for your business

SPEAKERS: TBC

3:00PM - 3:30PM AFTERNOON TEA

3:30PM - 3:50PM THE ROLE OF MENTORSHIP IN GROWING YOUR CAREER

The mortgage industry requires that all brokers (with less than two years' relevant finance and mortgage lending experience) should work under the supervision of a certified mentor during this time to ensure that consumers receive a quality outcome.

In this interview between a mentor and their mentee, learn firsthand about:

- How the relationship came to be
- How a mentor works with the broker
- The value of mentorship and results seen so far

MODERATED BY: James Mitchell, Managing Editor, The Adviser

SPEAKERS: TBC

3:50PM - 4:35PM ENERGY IS THE CURRENCY

The mortgage broking and finance industry typically demands long hours and is time-pressured. Burnout is often a key contributor to failure in the early stages of a broker's career.

In this session, discover how to protect your most precious career asset – your energy!

SPEAKER: Sam Makhoul, Managing Director, MSA National



The Adviser **NEW BROKER ACADEMY 2017**

AGENDA 2017

9:00AM - 9:30AM CARVE A LUCRATIVE FUTURE IN A BOOMING INDUSTRY

Will 2017 be your year to find a new career? Now is an exciting time to join the mortgage industry – the fastest growing sector in the financial services industry.

In this session, hear from one of Australia's leading brands on what it means to step into a life-changing career as a mortgage broker, including the skills, demands and high financial and personal rewards of this great industry.

SPEAKER: Richard Burns, General Manager Customer Experience and Technology, Aussie

9:30AM - 10:00AM WHY I CHOSE A CAREER IN MORTGAGE BROKING

In this session, hear firsthand from brokers on why they chose a career in the mortgage industry, including insights on:

- Being your own boss
- The financial rewards
- Building a business asset you can later sell
- Creating a flexible working environment

PANEL: Michael Barnard, Aussie Franchisee – Sunbury & Gisborne, AMA (Melbourne)
Norman Vancuylenberg, Director, Belden Home Loans (Melbourne)
Lisa Maxwell, Senior Mortgage Broker, Aussie Franchisee Annandale (Sydney)
Dean Soldo, Director, Soldo Financial Group (Sydney)
Dylan Salotti, Managing Director, Divitis Finance (Sydney)

10:00AM - 10:30AM HOW MUCH MONEY CAN YOU REALLY EXPECT TO EARN AS A MORTGAGE BROKER?

Hear from some of Australia's top brokers on their journey to the top and tips for financial success, including:

- What your earnings will look like in the first year
- How commissions work
- How to generate multiple revenue streams
- How to build a strong client base in the first year
- How to build an asset you can later sell

PANEL: Josh Egan, Astute Financial (Melbourne)
Anthony Albakov, CEO, My Mortgage Freedom (Melbourne)
Justin Doobov, Intelligent Finance (Sydney)
Aaron-Christie David, Director, Atelier Wealth (Sydney)

10:30AM - 11:00AM COFFEE BREAK

11:00AM - 11:20AM YOUR PATHWAY TO SUCCESS - HOW TO GET THERE

In this session, understand the essential requirements for kick-starting your career in mortgage broking today, including:

- Entry qualifications
- Joining an association

SPEAKER: Doug Daniell, Walker & Miller

11:20AM - 11:50AM TOP TIPS FOR CAREER SATISFACTION AS A MORTGAGE BROKER

- Five traits successful brokers have
- Five common pitfalls to avoid
- Where to get support

SPEAKER: James Mitchell, Managing Editor, The Adviser

11:50AM - 12:00PM CLOSING REMARKS

AGENDA 2017



Principal Partner



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