

The Adviser NEW BROKER ACADEMY 2017 AGENDA - BRISBANE



8:15AM - 8:45AM REGISTRATION

8:45AM INTRODUCTION FROM THE CHAIR

James Mitchell, Managing Editor, The Adviser

8:50AM WELCOME FROM OUR PRINCIPAL PARTNER

Robin Rose, State Manager - QLD/NT Broker Distribution, Heritage Bank

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 them on a pathway towards a successful, sustainable and valuable business. This will cover:

- The five must-haves for new brokers
- Critical challenges and success factors
- Goal setting and a process for continued improvement
- Managing 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 FRANCHISE VS NON-FRANCHISE?

A common question amongst many new to industry brokers is how to decide what's best - franchise or non-franchise? In this session, discover some of the pros and cons of each and how to choose a model fit for your business needs.

MODERATOR:

James Mitchell, Managing Editor, The Adviser

SPEAKERS:

Andrew Stevens, National Franchise Recruitment Manager, Yellow Brick Road

David Stewart, State Manager QLD/NT/SA, Vow

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 BROKER PANEL: SURVIVING THE 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
- How to overcome challenges to create more sales opportunities
- The importance of sticking with it

MODERATOR:

James Mitchell, Managing Editor, The Adviser

PANELISTS:

Joshua Vecchio, Mortgage Broker, Hunter Galloway

George Samios, Mortgage Broker, MADD Loans

Melanie Smith, Mortgage Broker, Aussie

Nathaniel Flack, Chief Executive Officer, Fundamental Business Finance

1:05PM - 2:05PM LUNCH

2:05PM - 2:35PM 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 and learn:

- Why it's about relationships
- How to structure your day to get the most out of it
- How to balance prospecting with excellent customer service
- How to build referral partnerships

SPEAKER:

Glenn Coutinho, Director/Auctioneer/Licensed Estate Agent, RT Edgar Boroondara

2:35PM - 3:00PM 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 mentor-mentee interview, 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

MODERATOR:

James Mitchell, Managing Editor, The Adviser

SPEAKERS:

Tracie Palmer, Director, Cornerstone Group

Tonia Harding, Lending Specialist, Loanlink Finance Brokers

Kane Dury, Mortgage Broker, Blue Sky Mortgage & Finance

3:00PM - 3:30PM AFTERNOON TEA

3:30PM - 4:15PM 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