

The Adviser BOOTCAMP SME BROKER 2017

AGENDA

8.15AM - 9.00AM REGISTRATION AND NETWORKING

9.00AM - 9.05AM WELCOME FROM THE CHAIR

9.05AM - 9.25AM THE OPPORTUNITY

The prize SME market is primed for growth. Now is the ideal time for brokers to capitalise on the current wave of opportunity.

In this session, catch a glimpse of what is happening right now including:

- Current market conditions and insights on the political climate set to fuel the growth of the SME market
- The size of the SME opportunity for brokers
- Why brokers make the perfect partner for SMEs

Presented by NAB

9.25AM - 10.25AM MASTERCLASS: WRITING SME BUSINESS

Transform your knowledge of the SME opportunity into real actions. This practical session is designed to teach you how to create stickier clients and attract new business through holistic financial advice

Discover how to:

- Position your business for growth to become a truly trusted SME partner
- Understand the value of your advice
- Understand balance sheets, cash flow and credit crunches
- Uncover clues in your client financial statements to add value to the relationship
- Educate and advise your clients on gaps and opportunities

Presented by The Institute of Strategic Management

10.25AM - 11.10AM MORNING TEA AND NETWORKING

11.10AM - 12.10PM PANEL: STRATEGIES FOR ATTRACTING NEW SME CLIENTS

Winning new business requires a unique and personal approach.

This session will deliver key market insights from The Adviser on why SMEs need financing and the areas of finance most important to SME businesses, followed by an expert panel offering first hand insights on how to:

- Market your services as an SME broker
 - Identify and capture a niche in your local market
 - Qualify an SME lead in your database
 - Identify what online channels SMEs use when looking for a service provider
 - Leverage your existing SME client networks to get referral business
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12.10PM - 1.10PM LUNCH AND NETWORKING

1.10PM - 1.55PM MASTERCLASS: WORKING CAPITAL KNOWLEDGE

Debtor finance is one of the fastest growing working capital products in Australia and around the world, so what do brokers need to know to succeed in this market?

In this session:

- Understand the seven cash drivers in a business
- Discuss the working capital cycle, including payables, receivables and stock
- Days on hand
- Look at an example of the level of working capital required to run a business
- Examine debtor / invoice finance and how it works
- Review some practical applications through real life case studies

Presented by Scottish Pacific

1.55PM - 2.40PM MASTERCLASS: EASY INCOME FROM RISK INSURANCE - A LIVE DEMONSTRATION OF A BROKER GIVING A QUOTE AND MAKING A SALE

In this session:

- Learn how to make your own business an effective "MMM" (Money Making Machine)!
- As part of this live practical demonstration, one lucky broker will receive a free Life, Income Protection or TPD Insurance policy for 12 months

• This session will demystify and make clear how life insurance can turbo-charge the income to your own business. Come and see how... and have a chance at being insured - for free!

• We will even show how to market yourself better and generate income streams from other products and services too!

Presented by Spectrum Wealth

2.40PM - 3.00PM AFTERNOON BREAK AND NETWORKING

3.00PM - 3.30PM PANEL: ALTERNATIVE FINANCE OPTIONS

3.30PM - 4.00PM MASTERCLASS: SHORT TERM LENDING

Short-term lending is highly flexible, quick and tailored to reflect the needs of individual clients. It is a particularly attractive option for SMEs when seeking to bypass cash flow issues or actualise business opportunities. In this session, discover:

- What short-term lending is
- Client benefits: how it can be used to address an immediate problem, or fulfil an unexpected opportunity
- Broker benefits: how to get a competitive edge through making short-term lending their niche

This session includes:

- A practical walk-through of a decision-making flowchart (i.e. to identify and process a short-term lending opportunity)
- Supporting materials/ hand-out: The go-to guide for short-term lending
- Drinks provided throughout the session

Presented by Semper Capital

4.00PM - 4.10PM CLOSING REMARKS