

HAVING REAL CLIENT CONVERSATIONS Transitioning to Fee for Advice - Masterclass

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For immediate release:

The Association of Financial Advisers and Securitor have come together to provide financial advisers with practical tools and ideas to help them work towards a fee for advice pricing model.

The 'Future of Financial Advice' breakfast masterclasses, being held during September in Sydney, Melbourne and Brisbane, will focus on how to have real conversations with clients about their needs and the value of professional advice.

CEO of the Association of Financial Advisers (AFA) Richard Klipin said "We understand how complex the issue of transitioning to fee for advice can be and some of the uncertainty surrounding client reactions to the transition process."

"In response to this, and drawing on the AFA's recent 'Back to Basics' consumer research, we wanted to provide advisers with a useful forum in which to learn more about current consumer attitudes toward advice and the best way in which to communicate with clients about the change to fee for advice services". Mr Klipin added.

Neil Younger, Head of Dealer Groups for BT Financial Group concurs "The transition to a fee for advice model can be a maze for advisers, particularly if you consider the current political uncertainty, reform agenda and industry changes we are experiencing."

"Providing advisers with practical tools that enable them to clearly articulate their service offering, pricing model and ongoing business plans is imperative in today's changing environment. We also understand that most advisers are at different stages in the transition process, so we have been mindful of this when developing the masterclass series so that the information is useful and helpful for all." he added.

Mr Klipin added, "Bringing the AFA's hands-on knowledge of advisers' needs together with Securitor's experience of supporting advisers in running their businesses provides a unique opportunity to get away from the theory and actually give advisers some tangible solutions."

AFA – The Association of Financial Advisers is a peak industry body - its aim is to provide members with a robust united voice, continually improve practices and focus firmly on the exciting, dynamic future of the financial advising industry.

Securitor – The Securitor dealer group (part of BT Financial Group) is passionate about delivering quality advice to Australians. The Securitor network supports more than 470 independent financial advisers who all share the passion – to grow sustainable, high performing and profitable advice businesses.

Masterclass Dates & Costs

Sydney	Tue 14 September	7.15 - 9.30am
Melbourne	Wed 15 September	7.15 - 9.30am
Brisbane	Tue 21 September	7.15 - 9.30am

Masterclasses are open to all advisers: \$75 AFA Members - \$100 Non AFA Members. (inc gst) - Includes: hot breakfast for all sessions.

For more information and to register contact:

Janelle Saunders, AFA
Ph: 02 9267 4003
janelle.saunders@afa.asn.au

Melissa Favaloro, AFA
Ph: 02 9267 4003
melissa.favaloro@afa.asn.au

To register follow this link: [Association of Financial Advisers](#)

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For media enquiries contact:

Lisa Parrett, PR Manager – Advice, BT
Financial Group
Ph: 02 8253 2363
lisa.parrett@btfinancialgroup.com

Julie Bennett, Principal, 64 Media
Ph: 1300 64 MEDIA
julie@64media.com.au