

November brings an IFA meeting with a difference!
In order to end the year with a bang we have decided to hold a debate to hash out
a current hot topic. The moot is:

“Charging fees is the remuneration of the future”

Wednesday, 11th of November

Agenda

- 4.00pm Registration
- 4.15pm Drinks and Canapés
- 4.45pm End of Year Round Up with Barry Read
- 5pm Debate
- 5.45pm More drinks
- 6.30pm Close

The Teams

<u>Affirmative</u>	<u>Negative</u>
 <p>Fred Dodds National Manager, TOWER Fred has been in the financial industry for 34 years and has been heavily involved in industry organisations as board member of IAFP. Fred is currently the IFA Chair in Wellington and has been used as an MC for various conferences.</p> <p>Fred is happily married to Maviene with two children and enjoys golf, billiards and snooker. Fred's been told he's a 100 break man! Fred will bring knowledge, wit, repartee and pool house humour to the debate.</p>	 <p>Ralph Stewart CEO, AXA Ralph has over 20 years experience in the financial and investment industries including General Management, Marketing and Strategic Development roles. Ralph holds an MBA (Hons) from Manchester University and a diploma of Business Administration from Victoria University. Ralph was appointed to the role of CEO for AXA New Zealand in October 2004 and lives in Wellington with his wife Anita and children, Sophie and Harrison.</p>
 <p>David Keys General Manager, Professional Investment Services (PIS) David has more than 20 years in the financial services industry and has been with PIS since May 2005. Prior to this, David held senior executive roles in several major Australian financial services organisations including The Commonwealth Bank and Macquarie Bank and MLC. David has qualified as a Certified Financial Planner and holds a degree in Marketing and International Marketing from the University of Southern Queensland. David interests include travel, films, cooking and reading. David lives in Auckland with his wife Lesley.</p>	 <p>Bronwyn Shanks General Manager, SHARE Bronwyn joined the financial services industry as an AXA adviser and learned everything she knows from her good friend and mentor Jon Turnbull. Bronwyn shifted to Auckland in 2004 and worked at Asteron before moving to London to become the Central Europe Sales Manager with Zurich International. In the last 18 months Bronwyn has completed a finance degree while taking up the helm of SHARE. Bronwyn loves lollies, ballet and designer shoes. She is also looking forward to getting married to her London-based fiancé Jeremy next year.</p>
 <p>Lyn McMorran President of the Institute of Financial Advisers (IFA) Lyn has over 20 years experience in the financial services industry. Her current position of Area Manager Southern for Westpac's Private Bank is based in Wellington and involves leading the Private Bank team in the Lower North and South Islands in providing comprehensive financial advice to the Bank's high net worth customers. Lyn's qualifications include a Graduate Certificate in Management from Charles Sturt University, NSW, Australia and the Graduate Diploma in Business Studies (Endorsed in Personal Financial Planning) from Massey University. She also holds the Certified Financial Planner professional designation. Lyn is married to Ed and they have 4 grown children between them.</p>	 <p>Barry Read General Manager, Newpark Branch Chair – Auckland IFA Barry has been a member of the Auckland Branch Committee for 10 years and has worked in the Life Insurance industry for 22 years. He has a background in corporate roles, as well as involvement on several industry committees and working parties. His current role sees him working with over 200 brokers in the largest independent dealer group in New Zealand. Barry is passionate about the advice business, and believes the next few years will provide our profession a chance to grow and benefit all participants who embrace the regulatory changes. He is also a devoted husband, father, rugby coach, cyclist, golfer, and Ford fan.</p>

This evening should prove to be one of entertainment and information.
Please feel free to invite your industry colleagues!