

# The much anticipated event this year for Accountants and Financial Advisers.

More fees... Increased profits... New clients...

- The focus is on what it takes to succeed in the accounting and financial services industries in 2010.
- Hear from Leading Advisers on how they are growing fee for service revenue, achieving greater referrals from COI and creating opportunities in niche markets.
- Hear from Leading Accountants on how they are generating more business advisory revenue.
- Find out how Alliance Partners are attracting new Pharmacy clients from industry specialisation.



## MUST ATTEND!

You can't afford to miss the Law Industry Specialisation Package LAUNCH\*

Two Advisers present their SME client staff and succession planning SUCCESS STORIES

## BSTAR'S ANNUAL AUSTRALIA & NEW ZEALAND ALLIANCE CONFERENCE

Jupiters Casino : Gold Coast 11 & 12 March 2010

### Your Presenting Peers:



Peter Scolari,  
Scolari  
Comerford CA



Adam Goldstien,  
Skeggs  
Goldstien



Mark Greaves,  
FutureBiz  
Advisors



John Bennetts,  
4 Your Success



Guess who..  
Pharmacy  
Industry champion



Brendon Harrex,  
Harrex Group



Joe Porteus,  
Shirlaws



Scott Patterson,  
Wealth  
Experience

### Featuring:

Mark Holton  
'The future  
for  
Professional  
Advisers'

### Earn CPE Training Points!

Technical workshops on business valuations, value gap, retaining and motivating staff and succession planning.

Become part of an elite network of like minded Professional Advisers sharing a passion for success in the SME market!

For more information please contact:

1300 552 577  
conference2010@bstar.com.au

\* Restricted offer



GROWING OR GOING?®

Special Early Bird Pricing available up until 12th February 2010

# BSTAR ALLIANCE PARTNER CONFERENCE AGENDA

Day 1 MC : Marie Bermingham - Sovereign Bridge Capital Group

## Future - Professional Advisers

Speaker: Mark Holton – 2020 Asia Pacific

Internationally recognised presenter, Mark Holton, managing director of 2020 Asia Pacific will provide up to date commentary on the future of professional services.



## Growing your business advisory revenue

Speaker: Brendon Harrex - Harrex Group

Young NZ Accountant of the year, Brendon Harrex, director of Harrex Group will showcase his business model for Accountants to grow their business advisory revenue.

Brendon's session will include how to transition to value based pricing, new client services, a Business Life Planning Program strategy, most importantly the implementation process and results achieved.

## Attracting new SME clients

Speaker: Peter Scolari - Scolari Comerford

Peter Scolari, managing partner of Scolari Comerford will showcase his business model for attracting new high value clients in the SME market.

Peter's session will include why value-adding services are an integral part of his new client acquisition plan, his innovative marketing strategies, the implementation process and the dramatic results achieved.

## Growing fee for service revenue in the SME market

Speaker: Adam Goldstien - Skeggs Goldstien

Adam Goldstien of Skeggs Goldstien, a successful, growing financial services business in North-Western Sydney, will share information on how he and his business partners have achieved great success providing high value fee based solutions to SMEs.

Adam's session will include information on how they have successfully integrated 'Bstar Services' into their business service offering, enabling them to add real value to their client's business and lives, while significantly increasing their average revenue per client.

## Achieving greater qualified referrals from centres of influence and creating niche market opportunities

Speaker: Mark Greaves - Future Biz Advisors

Mark Greaves from Future Biz Advisors will showcase his forward thinking business model for Advisers to build profitable centres of influence relationships and to take advantage of niche market opportunities.

Mark's session will include why he believes Advisers are best suited for the role of principal adviser, his win win approach to managing COI and how he has transformed his business to cater for the future needs of SMEs.

## Attend 2 separate Training Workshops each day (Law industry focus)

### Business valuations

Enhance your business valuation professional advisory skills by attending a practical training session. The session will enable you to better understand how to use the Bstar Business Capitalisation Rate Calculator to grow your client business valuation advisory services and end with an interactive demonstration of the new Law Business Valuation materials.

### Business value gap

Enhance your business value gap professional advisory skills by attending a practical training session. The session will enable you to better understand how to use the Bstar Business Value Gap Calculator to grow your client advisory services and end with an interactive demonstration of the new Law Business Value Gap materials.

### Managing staff

Enhance your staff management professional advisory skills by attending a practical training session. The session will enable you to better understand how to use the Bstar Staff Value Program to grow your staff management advisory services and end with an interactive demonstration of the new Law Staff Value Program materials.

### Succession planning

Enhance your succession planning professional advisory skills by attending a practical training session. The session will enable you to better understand how to use the new online Bstar Business Life Planning Program software to grow your client succession planning advisory services and end with an interactive demonstration of the new Law Business Life Planning Program materials.

## SPECIAL FEATURE - SME CLIENT SUCCESS STORY

Imagine inheriting a family business losing substantial money in a tough business environment.

John Bennetts from 4 Your Success will walk you through a compelling real life case study of how his specialised advice and support to the family successor resulted in an amazing 18 month turnaround in sales, margins and produced record profits.

Learn how John introduced the Bstar Staff Value Program to engage staff to increase sales, improve productivity and create the care factor.

**IMPORTANT**

# BSTAR ALLIANCE PARTNER CONFERENCE AGENDA

Day 2 MC : Martin Goodrich - Martin Goodrich and Associates (MGA)

## Improving your marketing and selling skills

Speaker: Joe Porteus - Shirlaws

What do you say when your clients ask: how much? The answer seems straight forward but for many Professional Advisers new fee opportunities are lost due to a lack of sales and marketing skills.

Joe Porteus, partner in Shirlaws Australian coaching business will showcase proven techniques for you to improve your client engagement rates. Joe's interactive coaching session will cover how to identify common road blocks when promoting new services, charge appropriately for these services and introduce powerful frameworks to establish a sustainable sales improvement process and build client loyalty.

## Improving your engagement rates with clients

Speaker: Paul Haselhurst - Bstar

You can waste a lot of time and effort if you get it wrong! Paul Haselhurst of Bstar has helped many Alliance Partners achieve great success in engaging with their business clients through using Bstar's simple proven process. This session will provide you with valuable information on how to improve your engagement levels with your clients by better understanding their needs and aligning your services so you can help them achieve their objectives – business and personal.

## Pharmacy Specialisation Success Story: Guess who?

With a minimum 1 in 5 prospective Pharmacists agreeing to an engagement consultation the Bstar Pharmacy Industry Specialisation Package has exceeded Alliance Partner's expectations.



With no previous experience in the Pharmacy sector, our Pharmacy industry champion will showcase how they have used the Pharmacy Industry Specialisation Package to attract new Pharmacy clients.

This session will include their marketing strategy, engagement process, new innovative in demand services offered to Pharmacists, pricing model and results achieved.

## Becoming a specialist adviser to the legal industry

Speakers: Grant Bloxham - Bstar  
John Duncan-Watt - Bstar



7,000 + law firms present an attractive niche market opportunity with industry specialisation providing the key to successful growth in this high value sector.

Grant Bloxham and John Duncan-Watt from Bstar will launch the Law Industry Specialisation Package\*.

This session features an analysis of industry needs and innovative marketing strategies to attract new law industry based SME clients.

\* this is a restricted offer.

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## SPECIAL FEATURE - SME CLIENT SUCCESS STORY

Discussing and resolving succession for most family and private businesses is challenging enough but for some farming enterprises it's almost impossible.

Scott Patterson from Wealth Experience was presented with a farming client succession planning scenario that will become increasingly more prevalent as baby boomers transition to retirement.

Key issues that needed to be resolved included; Dad refusing to discuss succession; the likelihood of family disputes increasing; and no formal plan on how to decide who gets what.



Learn how Scott introduced the Bstar Business Life Planning Program to his farming client to provide structured high quality succession planning advice.

# REGISTRATION FORM



Please print clearly

Mr/Mrs/Ms/Dr: \_\_\_\_\_ First Name: \_\_\_\_\_ Preferred Name \_\_\_\_\_

Surname: \_\_\_\_\_

Position: \_\_\_\_\_

Organisation: \_\_\_\_\_

Address: \_\_\_\_\_

Tel: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_

Email: \_\_\_\_\_

## TWO DAY CONFERENCE PACKAGE **(Please complete a form for each attendee)**

Includes 2 Day Conference Package & Networking Dinner, 11th March 2010 (one person per package)

PACKAGE PRICE = **\$1,650.00 inc GST per package** x \_\_\_\_\_

EARLY BIRD SPECIAL = **\$1,265.00 inc GST per package** x \_\_\_\_\_ **\*Ends 5pm February 12th**

Payment Details (Tax invoice will be forwarded with official receipt)

BSTAR'S AUSTRALIA & NEW ZEALAND ALLIANCE CONFERENCE - Total \$ \_\_\_\_\_

Please find enclosed cheque made payable to Bstar Pty Ltd

Direct Deposit (EFT) - Name: Bstar Pty Ltd  
BSB: 304-123  
ACC: 0226115

Please charge my credit card Total \$ \_\_\_\_\_  Visa  MasterCard

\* Only Visa and Mastercard Accepted. A service fee of 2% will be added to the overall charge.

Card No: \_\_\_\_\_

Cardholder's Name: \_\_\_\_\_ Expiry: \_\_\_\_/\_\_\_\_

Signature: \_\_\_\_\_

*\*Attendees are responsible for their own accommodation and travel charges.*



Please register in one of three ways:

1. HOTLINE: 1300 552 577 or FAX: 07 4755 0818
2. MAIL: PO Box 1378, Townsville, QLD, 4810.
3. EMAIL: [conference2010@bstar.com.au](mailto:conference2010@bstar.com.au)

Register TODAY