

# Introduction



Professional Investment Services

# Not Learning by Listening Passively to the Professor



# Learning by Doing



# The Bar is Set High



# Program Objectives

- General objective.
- To analyse what the GFC means for the financial adviser profession now and what will it mean for it going forward?
  - What changes has the GFC brought about that will affect the profession? How?
  - What are the possible downsides if you don't respond to these changes?
  - How should you change to avoid the downsides and to create upsides?

# Agenda: Five Learning Tools

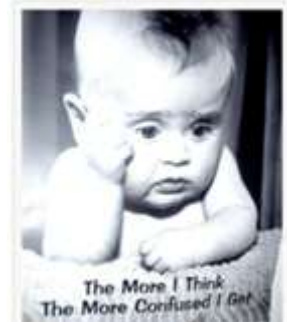
1. Reverse visioning exercise.
  - Some groups write a **cold-sweat nightmare article**, published two years from now, in The Australian Financial Review about the downfall of the financial advisor profession.
  - Other groups write a **sweet-dream article** about the profession's amazing turnaround.

Group work and presentations

2. Situation Analysis. Based on the reverse-visioning articles, what is and will be the impact on you of your:
  - Customers
  - Competitors
  - Company
  - Context
  - Complementor

Group work and presentations

3. **Gap Analysis: What will you do strategically to respond to the 5Cs?**



4. **Leadership Credo: What will drive you, as a person, to lead yourself and others to accomplish what you must achieve.**

5. **Beer and general merriment.**