

SAFAA 2020 WEBINAR proposal



The Stockbrokers and Financial Advisers Association (SAFAA) is the professional body for the stockbroking and investment advice industry. Our members are Market Participants and Advisory firms which provide securities and investment advice, execution services and equity capital-raising for Australian investors, both retail and wholesale, and for businesses. Practitioner Members are suitably qualified professionals who are employed in the securities and derivatives industry.

Educational offerings

SAFAA is renowned for its quality, university-accredited qualifications and professional development workshops for both new and experienced stockbrokers. Developed by the industry, for the industry, our bespoke and relevant content is integral to keeping members up-to-date with their FASEA requirements.

COVID-19 has brought about an opportunity to deliver accredited CPD content via panels, discussion, presentations and quizzes delivered online.

Our webinar offerings will be offered free to Principal, Practitioner and Affiliate members, will commence late May and continue throughout 2020. Between two and four webinars will be scheduled each month. The hour-long webinar will include the opportunity for Q&A as well as a brief quiz. Each webinar will be accredited by SAFAA as approved CPD.

www.stockbrokers.org.au

The 2020 webinar program is currently being developed. Topics to include:

- ✓ Code of ethics – meeting values
- ✓ Corporations Act – sections relevant to advisers
- ✓ Effective documentation practices for advisers
- ✓ FASEA professional standards – are you match fit?
- ✓ FASEA – how its Code of Ethics applies to stockbroking
- ✓ Fraud detection, breach register and reporting policy
- ✓ Holistic approach to advice
- ✓ How will ASX's blockchain change how everything is done?
- ✓ Impact investing – how have funds performed?
- ✓ Incremental tax advice – are you match fit?
- ✓ Marketing for investment advisers – how to gain new clients and use social media
- ✓ Marketing for investment advisers – how to sell the value of advice
- ✓ Panel: Attracting women to a profession in investment advice
- ✓ Panel: Cybersecurity – surveillance monitoring, cyber insurance and more
- ✓ Panel: Rethinking defensive strategies
Portfolio construction – know your client
- ✓ Technology – friend or foe?
- ✓ Understanding the characteristics of bonds
- ✓ When ASIC issues a notice
- ✓ Workshop: Managed accounts

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Participant profile

SAFAA events are geared to stockbrokers and investment advisers, a specialist audience. With the removal of both travel and registration fees, we anticipate approximately 50-100 per webinar, subject to topic.

Member firms will support these webinars by distributing it to their respective departments. Participants will include practitioners who work in executive management; sales trading; research sales; compliance; risk management; operations; and those working with private advisory and wealth management clients.

Sponsorship offer \$5,500 including gst

Your company logo will be included on all eDMs distributed to promote this webinar series (minimum two per month).

Your company logo will be posted to our webinar landing page with a reciprocal link to your website.

Opportunity to include a half-page ad (190mm wide x 130mm deep) or a generic educational article in the monthly SAFAA newsletter sent to 5,000+ investment advisers and stockbrokers (open rate 66%).

Opportunity to moderate, present or participate in a webinar subject to SAFAA discretion.

Why sponsor

Align your firm and brand with the only association representing both the stockbroking and investment advice industry.

Raise your profile with the Australian stockbroking and investment advisory industry and generate lead sales.

Regular brand promotion over a six-month period, as well as an opportunity to moderate and/or present a webinar, will provide your company significant market exposure and build your brand.

Cost-effective market exposure over a lengthy period of time.

www.stockbrokers.org.au



For more information please contact

Silvana Eccles

Business Development Manager

silvana.eccles@stockbrokers.org.au

0412 938 466



**Stockbrokers
and Financial Advisers**

Association Limited