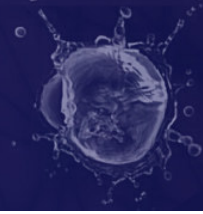


FRESHWATER FINANCIAL MARKETING



PRESENTING

**THE GLOBAL ADVISER PROGRAM
2011**

“GAP”

*Your gateway to the
global financial services markets*

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OVERVIEW

The globalisation of financial services has broadened the reach of Australian advisers into offshore markets, driven by the increasing growth in client investment in the developed and emerging markets.

Additionally, there is a growing awareness among advisers that receiving financial information from secondary and third party sources can be self limiting and they seek to gain a better understanding of off shore investment trends. By undertaking visits to these markets and meeting with investment managers and other financial services professionals has proved beneficial.

Australian advisers also welcome the opportunity to meet with advisers located in offshore markets to gain an understanding of how they manage and grow their practices. Returning home armed with fresh thinking and a range of new ideas they often are able to approach practice management and growth strategies in a new light.

THE GLOBAL ADVISER PROGRAM “GAP”

The objective of the **Global Adviser Program “GAP”** is to provide advisers and other senior industry professionals with an in depth, on the ground view of investment and product trends in global markets, along with affording them the opportunity to discuss concrete practice management and growth strategies for their businesses, sharing their views with their off shore colleagues.

The GAP program has been scheduled to connect with the following two major financial services conventions:

- The **Financial Planning Association** USA – 16th – 19th September 2011 in San Diego
- The **Institute of Financial Planning**, UK – 3rd – 5th October 2011 in Wales.

These conferences feature comprehensive continuing education programs and encourage interaction and networking amongst financial services professionals.

Australian advisers who have attended previously have found the content and networking invaluable in terms of gaining first hand knowledge of the global markets and trends in practice management

THE GLOBAL ADVISER PROGRAM



The Principals of Freshwater Financial Marketing will lead the GAP program and include individual meetings with investment professionals and advisers from UK/Europe, the United States and Asia encouraging opportunities of cross border working relationships.

WHAT YOU CAN EXPECT FROM 'GAP'

Freshwater Financial Marketing will act as your single point of contact and will be responsible for:

- Coordinating the detailed travel & meeting agenda
- Registration at the FPA, USA *and / or* IFP UK
- Pre arranged meetings with a select group of Global Investment/Wealth Managers in the USA *and / or* UK/Europe
- The opportunity to travel with fellow financial services professionals
- Ensuring you are afforded relevant networking opportunities with off shore colleagues

OUR APPROACH

Freshwater Financial Marketing offers a bespoke, highly personalized approach to all projects and assignments we undertake on behalf of clients, allowing them to focus on the areas they know and understand best whilst drawing on our knowledge and experience to provide expert local information, advice and support.

We recognize that no two businesses are alike in their service offering, products, resources and business/financial objectives. Our aim is to align our interests to that of our clients, tailoring our services to meet their individual circumstances and ensuring they receive maximum benefit from our advice and global programs.

ITINERARY (DRAFT)
GLOBAL ADVISER PROGRAM “GAP”

Incorporating
FINANCIAL PLANNING ASSOCIATION, USA

San Diego, USA, 16th – 19th September 2011

and/or

USA AGENDA (5 NIGHTS)

- Financial Planning Association Conference including:
 - Behavioural advice
 - ETF Managed solutions
 - Portfolio construction and Investment Policy
 - Networking and discussion in the International knowledge café daily
 - Multi generational Planning
 - Global investment and financial planning updates and more.....

| | |
|--------------|-------------------------|
| Day 1 | Details to be confirmed |
| Day 2 | Details to be confirmed |
| Day 3 | Details to be confirmed |
| Day 4 | Details to be confirmed |
| Day 5 | Details to be confirmed |
| Day 6 | Details to be confirmed |

WHAT'S INCLUDED & PRICING

The cost to participate in the program includes:

- Air travel economy class (flights depart Sydney or by arrangement)
- Accommodation for the duration of the "GAP" program
- Transfers to and from airports and hotels
- Full Registration at FPA USA annual conference *and / or*
- Full registration at the IFP UK Conference

Please contact Julie Rigoni at Freshwater Financial Marketing for costings.

CONFIRMATION & PAYMENT

The "GAP" program has been designed to benefit all participants. However should you have any specific requests please feel free to contact us for further discussions.

Confirmation of your participation will be acknowledged with

- 1.) A completed application form and a deposit of \$2,000 (non refundable)
- 2.) Final payment to be made 10 weeks prior to departure.

“GAP” BOOKING FORM
The Global Adviser Program – 2011
Incorporating FPA USA Conference & or IFP UK

Booking Form

Please complete details below and return:

Name: _____

Company: _____

Address: _____

Telephone: _____ Fax: _____

Mobile: _____

Email: _____

Please nominate the segments of the program you would like to participate:

USA conference San Diego

UK conference Wales UK

Additional Information: _____

Special Requests: _____

Please note confirmation will be acknowledged with a completed application form and \$2,000 non refundable deposit made payable to Freshwater Financial Marketing Pty Ltd (ABN23 103 410 420).

For more information please don't hesitate to contact:

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