

SAFAA 2021 WEBINAR proposal



The Stockbrokers and Financial Advisers Association (SAFAA) is the professional body for the stockbroking and investment advice industry.

During the challenging time of COVID-19, we've seen our regular SAFAA-accredited webinars become the trusted source of information for this hard-to-reach, time-poor professional community. We invite you to engage with our association to reach your next clients.

SAFAA is also renowned for its quality professional development workshops for both new and experienced stockbrokers and investment advisers, as well as other employees who need to understand the securities and derivatives market.

Developed by the industry, for the industry, our bespoke and relevant content is integral to ensuring practitioners and others can apply their learning in the workplace and remain up-to-date. We cover content relevant to the professional standards required by FASEA and TPB as well as the real-world knowledge and experience required to operate in capital markets.

Our SAFAA CPD accredited webinars attract between 50 and 150 participants and are offered free to our members. Between two and four webinars are scheduled each month. The hour-long webinars include the opportunity for Q&A as well as a brief quiz.

Proposed topics for 2021

- ✓ Analysing listed investment trusts
- ✓ Best interest duty — applying it
- ✓ Effective documentation practices for advisers
- ✓ ETF tax administration
- ✓ FASEA application of the Code of Ethics to stockbroking
- ✓ Fundamentals of behavioural finance — overconfidence bias
- ✓ Handling client monies
- ✓ Impact investing — management and measurement
- ✓ Legislation update — are you match fit?
- ✓ Managing international equity portfolios
- ✓ Marketing for investment advisers — how to sell the value of advice
- ✓ Panel: Alternative investments — private equity; hedge funds; infrastructure
- ✓ Portfolio management — asset allocation
- ✓ Portfolio management — research
- ✓ Portfolio management — tools
- ✓ Talking multi-family office wealth
- ✓ Tax and the structure of investments
- ✓ Understanding hybrids
- ✓ Using innovative technology for growth and success
- ✓ Working with multi-generational clients and staff

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Sponsorship offer **\$5,500 including gst** for a six-month period

- ✓ **Webinar presentation:** you will have the opportunity to engage directly within our webinar series either through moderating, presenting or as a panel participant within your area of specialty.
- ✓ **EDM opportunity:** following the webinar we will send a dedicated email to the attendees on your behalf.
- ✓ **Branding:** your company brand will be included on all EDMs (between 14 and 18 EDMs over a six-month period) distributed to promote this webinar series that reaches a circulation of approximately 5,000 as well as the employees of our 32 principal member firms.
- ✓ **SAFAA Monthly newsletter:** opportunity to include a half-page ad (190mm wide x 130mm deep) plus an educational article targeted at advisers and stockbrokers in the SAFAA Monthly newsletter sent to 5,000+ investment advisers and stockbrokers (open rate 66%).
- ✓ **SAFAA website:** your company brand will be placed on our webinar landing page that will guarantee you a highly viewed positioning within the registration process with a link to your website.

Why sponsor

Due to the impact of COVID-19, it is very challenging to reach potential new customers. Face-to-face events still appear to be some time away and will evolve given the



profound shift to operating online. Our webinar series will provide you with the golden opportunity to increase your ability to capture new enquiries and lead generation.

- ✓ **Showcase your expertise:** the opportunity to participate in a webinar and contribute an educational article will promote your organisation as a specialist in your field of expertise.
- ✓ **Direct promotion:** provides the opportunity to promote your product or service directly to those most interested.
- ✓ **Brand promotion:** regular brand promotion via our EDMs, SAFAA Monthly newsletter and website over a six-month period will ensure that your brand remains at the forefront of members' minds.
- ✓ **Niche market exposure:** Cost-effective exposure directed to a specialist audience over a lengthy period of time.
- ✓ **Brand alignment:** align your firm and brand with the only association representing both the stockbroking and investment advice industry.

You will engage with professionals working in:

- ✓ executive management
- ✓ sales trading
- ✓ financial and wealth advice
- ✓ research sales
- ✓ compliance
- ✓ risk management
- ✓ operations

For more information please contact

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