

hosted by



# *Invitation to Attend*



money  
**personality**

*Know yourself and Know others*

## **Adviser Briefing on Understanding Clients' Psychological Preferences using Money Personality**

**Date** Friday 24th February 2012

**Time** 12.30pm - 2.00pm

**Venue** Zurich Auditorium ~ 5 Blue Street, North Sydney

**Cost** Complimentary with a light lunch provided prior

**RSVP** by 17th February ~ Jessica Chen ~ [jessica.chen@zurich.com.au](mailto:jessica.chen@zurich.com.au)

### **Why attend?**

- Know clients beyond fact finds and risk profiles
- Understand client diversity and personal financial behavioural biases
- Learn the commercial benefit of understanding your clients' psychological motivators
- Gain a deeper appreciation for different preferences for building wealth
- Build awareness of a scalable model to capture the hearts and minds of clients

- 
- Simon Hoyle Editor Professional Planner Magazine
  - Matt Linnert Co-Founder Money Personality
  - Robert Skinner Director innergi

sponsored by



*“Giving advisers an insight into what makes a client tick”*

Simon Hoyle, Editor, Professional Planner

*“Assisted greatly in the formation of deeper, more informed & highly trusted relationships”*

Kristine Wade, Head of Retail Sales - Investments