

# Tony Vidler

## Adviser to the Advisers

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### Speaker. Marketer. Coach. Educator.

Professional, Practiced, Proficient – and Practical!

Beginning with the basic belief that you can do well in business by doing business well, I talk about real world ways to improve prospecting, business systems and bottom line results. This is "Practical Professionalism"...with emphasis on the practical...and preferably getting results really quickly.

Blending the experience of traditional successful prospecting & marketing methods with today's technology and opportunities, and working out how to apply them to get more business is the key theme for most presentations and sessions. Most presentations are bespoke, in that I will spend the time understanding what the client is looking to achieve with their audience, and then approach the topic in a way that drives the key messages for the conference host.

### Specific Areas of Presentation Expertise

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#### Compelling Value Propositions

(Example: <http://www.slideshare.net/tonyvidler/buildin> )

Understanding, creating and crafting a strong value proposition – or “promise to the market” – is an ongoing problem for most professionals. I show how to create and craft unique selling propositions which are professional, and effective.

#### Personal Branding

(Example: <http://www.slideshare.net/tonyvidler/why-you-v2-powerpoint> )

Building a brand, whether it is personal or corporate, is a process that blends strategic thinking, creativity, articulating value in the customers language, and capturing it language and visuals. I show how to do that.

#### Digital Marketing & Social Media

(Example: <http://www.slideshare.net/tonyvidler/getting-from-chat-to-cha-cha> )

Building an online presence, and looking good online is critical today. Working out which mediums work best for different businesses, and creating strong engagement strategies for those channels is a key marketing issue for professionals.


#### Practice Management

(Example: <http://www.slideshare.net/tonyvidler/an-eagle-eye-view-of-your-business> )

Understanding capacity, capability and opportunity inside any professional business, and building the right systems and processes are critical to a firms success. This subject has many many different angles to it.

In addition to these areas of greatest general interest I am considered one of the leading experts in professional advice processes, compliance and professional practice standards, and am occasionally called





upon to provide expert witness services in respect of these areas, as well as presenting upon them in professional development sessions.

A full main platform presentation can be viewed at: <http://youtu.be/ofCUEgRHeV8> if required

## Professional Publications

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**Financial Alert.** (Examples can be viewed at: <http://financialadvisercoach.com/magazine-articles/> )

A regular contributor to the leading Australasian ezine for professional financial planners, covering a variety of planning topics from technical content through to marketing and practice management issues.

**Other:**

A frequent published contributor to Asset magazine, riskinfo e-Magazine, Financial Planet, and, Adviser Voice, together with my own blog [The Financial Adviser Coach](#) (over 350 posts, distribution to 9,000 readers and about 50,000 views p.a.)

Tony's first book – **“Why You?”** – will be published in 2016. It is a practical guide for professionals seeking to differentiate in a crowded market, and have customers choosing them!

## Recent Speaking Engagements & Industry Achievements

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In the last 2 years the following firms have engaged me for conferences, roadshows or professional development days for their audiences:

*Advice networks:* Ginger Group, The National Partnership, Newpark, Infocus Wealth Management, Liberty Group, The Social Adviser, Planet Group, Tower Financial Adviser Network, Lifetime Dealer group, Apex, Kepa Dealer Group, Spicers Financial Planning – and several of these have repeatedly engaged.

*Professional bodies:* Financial Markets Authority (NZ), Institute of Financial Advisers (NZ), NZICA (Auckland), IBANZ (NZ)

In addition, I have provided over 240 delivered hours of workshops, roadshows and speaking sessions through the Elite Professionals Programme which was a joint venture during this period in the same timeframe. There have also been several podcasts and webinars of course.

Notable professional achievements:

- [Financial Standards “Power 50” Social Media 2013](#) - The 50 most influential social media people in financial services, 2013. They are the innovators, influencers and news-breakers who use their online clout to call the industry to account.
- [Top 250 Financial Services Global Online Influencers 2014](#) – industry researched & compiled listing
- A regular feature article writer for various global financial advice industry publications
- [Financial Alert Person of the Year 2011](#) - Leading industry publication recognition of an individual who has made the most significant difference to the NZ financial services industry each year.
- Chairman, Board of Directors of [Institute of Financial Advisers NZ](#), July 2011 – July 2013
- Director of [Institute of Financial Advisers NZ](#), June 2006 – July 2013
- Served as Chair of the College of Insurance Advisers, Chair of the Professional Development Committee, Certification Committee member and a number of Institute board and branch committees.



## Fee Schedule

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All fees quoted are in New Zealand dollars (NZD) Fees may be subject to an addition of Goods & Services Tax (GST) at 15% as prescribed, if services are being provided in New Zealand. Services outside New Zealand do not generally incur this tax addition.

**Keynote sessions:** \$4,000

**Break-out sessions:** \$2,500

**Roadshow sessions:** \$3,000 per day.

**Workshops:** \$3,000 per day.

### Expenses policy:

Travel and accommodations costs to be reimbursed. Accommodation is typically 3 or 4 star hotel, and airfares are generally economy or premium economy for up to 10 hours flying time. Longer flights are Business Class. I will arrange airfares (some airlines I won't use) myself, but be reimbursed at actual cost.

**General Note:** These fees take into account initial discussions to work out brief, and session preparation time. They may or may not include travel time, depending on the location of a venue and the logistics involved. All expenses will be discussed and agreed to prior to engagement. *Favorable pricing given for exotic locations or places I've not been before!*

## Testimonials...just a taste!

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### [Michael Kitces](#)

*Publisher, Kitces.com & Partner at Pinnacle Advisory Group*

Tony brings an incredible perspective for coaching advisers, thanks not only to his extensive experience working with advisers over the years, but also due to his volunteer work with the Institute of Financial Advisers, and his efforts to connect with advisers globally and bring home ideas, concepts, tools, and techniques that can be applied...

### [Jenny Pearse](#)

*Key Relationship Manager at The Social Adviser | Business Consultant at Jensis |*

...Tony delivered an amazing presentation that opened the eyes of the delegates and delivered clarity on "Why You"! I have been keenly following Tony for some time and find his message positive, structured and build on a great depth of experience.

Five minutes with Tony can provide so much insight into what your true potential and direction can be, I just don't know why you wouldn't listen to him!

Tony is articulate, professional and thoughtful I would recommend him highly for your next conference/workshop/program.



[Steve Holmes](#)

*Co-Founder Feedsy & Marketing Manager for Financial Advisers*

Tony Vidler is an inspiring and knowledgeable business coach and is a true leader in in the advice space. He will challenge the status quo and provide a practical and personal approach to move your business forward... He is a great presenter and has a deep understanding of your personal brand...

## Speaker Bio

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### *Adviser to the Advisers*

Tony Vidler is the expert in professional services at helping advisers create the personal branding and target marketing positioning they want; the internal systems to convert more existing opportunities; and; the lead generation and engagement strategies that lead to new customers.

Tony's objective, and value proposition is simple:

***“Get my customers more customers”***

Tony has been working in the NZ financial services industry in advisory and management capacities since 1990, beginning as a tied life agent. Over his career he has been involved in agency management roles; started, grown and sold a sizeable investment and insurance brokerage business of his own; been personally involved in business development with hundreds of advisers; heavily involved in professional development and the evolution of regulation in the NZ industry; executive sales and marketing management and been a leading figure in the NZ financial services industry for many years.

In addition to running his own coaching and consultancy business, Tony has been the Chairman of the Board and served as a Director for 8 years for at the Institute of Financial Advisers as well as an Independent Director or Advisory Board member to numerous businesses. He has led the professional development in the industry as Chair of the Professional Development Committee, Chair of the College of Insurance Advisers, and a member of the Certification Committee at various times.

*Professional selling & marketing of professional services is his forte.*

These days he delivers personal coaching and consultancy to advice businesses via Strictly Business, and provides coaching and professional development programmes with his business partners in the Elite Professionals Programme.

With a strong belief in personal and professional development Tony has been in relentless pursuit of more knowledge and better practices, and the sharing of that knowledge. His professional qualifications include Certified Financial Planner, Chartered Life Underwriter and Chartered Financial Consultant, which are all the result of rigorous academic programmes, mentoring and practical assessment.

He is a frequent speaker in NZ and overseas as well as being a prolific writer with a large following, and extensive social media presence. His expertise in digital marketing has been recognised with his inclusion on the [Financial Standards Power 50](#) most influential people in social media in financial services,



[and recently being named as one of the Top 250 Online Influencers in Financial Services Globally \(ranked #135\)](#)

Remarkably passionate about creating an advisory profession and building better businesses Tony is an innovative strategic thinker with the ability to teach people very quickly how to apply ideas in practical ways. He is fuelled by good food, good wine, laughter and the love of learning and sharing.