Tony Vidler

Adviser to the Advisers

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Professional, Practiced, Proficient – and Practical!

Tony focuses on helping professionals build more profitable advice businesses. There are many many things that can be done to build a better business, but Tony has a simple beginning point:

Do you have as many customers as you need?

A simple question perhaps...but a complex problem for many.

This is key issue that Tony resolves:

www.tonyvidler.com

Tony brings over 27 years experience in financial services as an adviser, advisory firm Managing Partner, professional association leader and Chairman of the Board, director and governance expert, and institutional general manager. There is little that he hasn't dealt with when it comes to improving distribution performance and building better businesses.

Focussed on real world ways to improve prospecting & marketing, business systems and bottom line results, it is always about ***"Practical Professionalism"***...with emphasis on the practical. Business is always about getting results.

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. Typically Tony's presentations are bespoke, and designed specifically for each client, and each conference. By spending the time understanding what ***you*** are looking to achieve for ***your*** audience, we'll then approach & design a session in a way that drives the ***key messages that you want delivered***.

Particular Areas of Presentation Expertise

Compelling Value Propositions

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

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

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. This is an area that I demystify and help create workable tactics – quickly.

Practice Management

Understanding capacity, capability and opportunity inside any professional business, and building the right systems and processes are critical to a firm's success. This subject has many many different angles to it, and presentations can be designed to address particular issues at your request.

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 (although that was a rather "formal" one), and there are a vast range of "Quick Tips" video's available at https://www.youtube.com/playlist?list=PLGGcsPtChMLJ_tinvu_5kHJrxByxeM3SI

Professional Publications

I have been a regular contributor to industry press for professional financial planners & insurance advisers, covering a variety of planning topics from technical content through to sales, marketing and practice management issues.

Published in Asset magazine, riskinfo e-Magazine, Financial Planet, MDRT, and, Adviser Voice, together with my own blog The Financial Adviser Coach (over 700 posts, over 17,000 readers and about 1.4 million visits)

Recent Speaking Engagements & Industry Achievements

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, Fidelity Life Assurance, Elite Professionals Programme, Solutions Dealer Group, The Social Adviser, Planet Group, Tower Financial Adviser Network, Lifetime Dealer Group, Apex, Kepa Dealer Group, Spicers Financial Planning, AMP Advisers Association, TAL Australia – with many repeatedly engaging.

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

In addition, I have approximately 300 delivered hours of workshops & courses of my own design outside of pure speaking engagements in the last few years. There have also been several podcasts and webinars, together with regular webinar training programs and workshops for various clients.

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 – industry researched & compiled listing
- An Expert Witness for professional practice and advice related litigation issues.
- 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
- Fellow of the Institute of Financial Advisers.
- 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

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 may not incur this additional tax.

***Individual event pricing*:**

Keynote Conference sessions: $5,500

Break-out (conference or PD Day) sessions: $4,000

Roadshow sessions: $4,000 per day.

Workshops: $4,000 per day.

I am happy to combine Keynote and Break-out session work at reduced pricing if both are required at a conference.

Expenses policy:

Travel and accommodations costs to be reimbursed at actual cost. Accommodation requirement is 3 or 4 star hotel, and airfares are generally economy or premium economy for up to 10 hours flying time. Longer flights will be Business Class. I will arrange airfares (as some airlines are unreliable) myself, but be reimbursed at actual cost.

General Note: These fees take into account initial discussions to work out brief, and session preparation time, together with delivery of the content at your conference. 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!

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 Jenesis*

…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!

Speaker Bio

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 mainly in New Zealand, together with developing and delivering professional development programs internationally.

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 programs, 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 recognized with 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.