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:

Tony brings over 3 decades of experience in financial services as an adviser, advisory firm Managing Director, 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. If it doesn't help practitioners get real business results then I'd be wasting everyone's time...and I don't like that.

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.

Keynote Topic Areas

Creating Compelling Value Propositions

Understanding, creating and crafting a strong value proposition – or "promise to the market" – is an ongoing problem for most professionals, and a barrier for prospect engagement if they don't have it right. I show how to create and craft unique selling propositions which are professional, and effectively create engagement with more customers.

Negotiating Todays Challenges In Advice

Product sales versus advice value…commissions and fees….defensible advice processes….client engagement…succession and realizing business value….all are significant issues requiring evolutionary thinking, strategy and focused execution to adjust business models and plans. I offer practical solutions that practitioners can implement to help resolve these issues.

Digital Marketing & Engagement Marketing

Financial advice has already shifted from pure product placement to relationship management, and that means building systems to create and then maintain engagement. Working out which mediums work best for different practitioners and creating strong engagement strategies to drive prospects along the buying path is essential. This is an area that I demystify and help create workable tactics – quickly.

Practice Development

Success for professional services firms hinges upon development and best use of their capacity, capability and opportunity. Each of these 3 areas require systems, processes and resources to achieve maximum business potential. Overlaying that however is "Culture"…and more importantly, how to create the culture you want in your practice (and why it matters). Then you can build the systems for success…

Workshops & Breakout Sessions

30-60 minute breakout sessions can be largely constructed to suit your needs from within the broad range of sales, marketing, practice management or professional development areas that I work with. My preference is to "design to suit your audience", so let me know what you need and we'll put together a plan!

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 pretty much every industry media publication together with my own blog The Financial Adviser Coach (over 700 posts, more than 23,000 readers and over 3 million visits)....people listen and like our way of tackling issues and solving problems.

Past 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, MySolutions 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)

I have also delivered well over 350 hours of workshops & courses of my own design in the last couple of years, in addition to many webinars or podcasts.

Some professional milestones:

- 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: $3,500

Roadshow sessions: $3,750 per day.

Workshops: $3,750 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!

Susie Munro (Publisher, Sixpence Media)

Tony's got that ***great combination of real world experience, theory, ability to communicate effectively, and a friendly, funny, helpful personality***. His blog and videos are a gold mine of practical tips for financial advisers, and he's an entertaining and knowledgeable speaker.

Jason Bamford (National Sales Manager, TAL Australia)

… Attendees highly valued the relevance of the content and quality of delivery. Feedback included – 'Tony Vidler was excellent. ***One of the best presentations I've seen over the years***. Great ideas & information.' Tony was a pleasure to work with. He delivered with very tight timeframes and exceeded expectations…

Shakira Moss (Doodler Video Scribing)

…He presented a wonderful seminar on Marketing and Creating a Brand for yourself and your business which ***left the audience wanting more!*** His professionalism and knowledge in this field is also highlighted with very informative newsletters that are sent out, that are always interesting to read. Tony is very easy to talk to and his public ***speaking skills keep the audience engaged and interested*** right to the end!

https://www.linkedin.com/in/tonyvidler/

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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 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.

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