AUSTRALIAN INVESTORS ASSOCIATION

Investors helping investors

AIA National Investors Conference 25th to 28th July 2010

Surfers Paradise Marriott Resort & Spa, Gold Coast

The one conference all investors should attend

Investment strategies for changing markets

Speakers include

Louise Bedford
Trader & Author

Robin Bowerman
Head of Retail, Vanguard Investments Australia Ltd

Andrew Doherty
Head of Equity Research, Morningstar

Jody Elliss,
CEO, Investor Centre

Alan Hull
Trader & Author

Craig James
Chief Economist, CommSec

Stephen Mayne
Shareholder Activist

Colin Nicholson
Author & Teacher

Marcus Padley
Author, Marcus Today Stockmarket Newsletter

Mark Simpson
Head of Research, Patersons Securities Ltd

Conference program

Commences the evening of Sunday 25 July with a keynote address followed by happy hour. Sessions continue Monday, Tuesday and Wednesday. In addition to the seven plenary sessions, six streams run through the program. The 40 presentations cater to all investors, from beginner to the more experienced. Topics range from in-depth share selection and selling strategies to property investing to self managed super funds and more. Speakers are from a variety of backgrounds – investment professionals, successful investors, authors and educators. View the full program overleaf.

Features pre-conference optional Introduction to Investing and Introduction to Technical Analysis workshops.

Who should attend

- Experienced investors who wish to stay abreast of the markets and become aware of future trends
- New or inexperienced investors
- Trustees of SMSFs
- Anyone thinking about establishing a SMSF
- Anyone approaching retirement who wishes to ensure their money will last as long as they do
- Anyone who has inherited assets and not sure what to do or who to trust
- Investors who wish to meet other investors

The Australian Investors Association is a non-profit association providing independent, high quality, value for money education to individual investors.

Sponsors

Vanguard INVESTMENTS®

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Investor Centre

lincoln Intelligent sharemarket solutions™

smith & hall

Orchard Funds Management

Super Plus®

HURRY! REGISTER BY 15 MAY TO RECEIVE EARLY BIRD DISCOUNT!

DAY 1 – SUNDAY 25 JULY

1 to 4.30pm	Introduction to investing - Jamie Nemtsas	Introduction to technical analysis - Neil Godwin
5 to 6pm	The great decoupling - Jonathan Pain, The Pain Report	
6 to 7pm	Happy Hour & State Group Meetings	

DAY 2 – MONDAY 26 JULY

8.00am	Investing in turbulent times - John Abernethy, Clime Asset Management		
9.00am	The truth about the stock market - Marcus Padley, Marcus Today Newsletter		
10.15am	Morning Tea		
10.45am	Opportunities in a changing residential property market - Mike Anderson, Silverhall	Financial markets as complex adaptive systems 1 - Alan Hull	Information technology sector - John Grant, Data3
11.45am	What every landlord needs to know - Ray Milton, REIQ	Financial markets as complex adaptive systems 2 - Alan Hull	How to invest in gold - Jamie Nemtsas, Lachlan Partners
12.45pm	Lunch		
1.45pm	Property investor excellence - risk management & best practice, Stacey Holt	Profitable investing by following the trend - Justine Pollard	Retail sector - Matthew Cahill, JBWere
2.45pm	Navigating the commercial property recovery - David Hinde, Orchard Funds Limited	Selecting stocks for the long-term portfolio using fundamental analysis - Andrew Doherty, Morningstar	Electricity markets & emissions trading - Tim Nelson, AGL
3.45pm	Afternoon Tea		
4.15pm	The economic outlook - Craig James, CommSec		
5.15pm	Happy Hour		
5.45pm	Online Forum Demonstration		

DAY 3 – TUESDAY 27 JULY

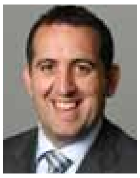
7.30am	StockDoctor Presentation	Diversification with art - Cameron Hall, Smith & Hall	
8.30am	The need for an investment plan - Colin Nicholson		
10.00am	Morning Tea		
10.30am	SMSF record keeping - Petrina Stamos, Snelleman Tom	Using technical analysis to find high probability trades - Louise Bedford, Trading Secrets	CFDs - the facts, the advantages and how to use them as part of your portfolio - Jim Taig, Seismo Market Solutions
11.30am	SMSF contribution strategies - Phillip Whiteley, Super Plus	Dive brain-first into sharemarket profits - Louise Bedford, Trading Secrets	LICs: getting back to basics - Jonathan Morgan, ASX
12.30pm	Lunch		
1.30pm	SMSF pension strategies - Graeme Colley, ING	Elliott wave theory - Daniel Goulding, RBS Morgans	ETFs as the core of your portfolio - Robin Bowerman, Vanguard
2.30pm	SMSF estate planning - Rachael Rofe, Dixon Advisory Service	REITs - is now the time to consider investing? - Warren Boothman, MacarthurCook	Listed income rate securities - Brad Newcombe, FIIG
3.30pm	Afternoon Tea		
4.00pm	What works on Wall Street? – Roger Montgomery		
5.00pm	Happy Hour		
7.15pm	Conference Dinner - doors open		
7.30pm	Conference Dinner commences		

DAY 4 – WEDNESDAY 28 JULY

8.00am	Diversification with art – Cameron Hall, Smith & Hall		
9.00am	The formula that works - fundamental analysis made easy - Roger Montgomery	Agri-resources - the new gold - Mark Simpson, Patersons Securities Ltd	Portfolio master class1 - Facilitators, Scott McKenzie & Bill Dodd, AIA Councillors
10.00am	Morning Tea		
10.30am	Portfolio protection using options and index futures - Jody Elliss, Investor Centre	The financial sector - Ty Laird, Macquarie	Portfolio master class 2 - Facilitators, Scott McKenzie & Bill Dodd, AIA Councillors
11.30am	Managing risk for profitable investment in the share market - Julia Lee, Bell Direct	Small companies, big opportunities - Elio D'Amato, Lincoln Indicators	Portfolio master class 3 - Facilitators, Scott McKenzie & Bill Dodd, AIA Councillors
12.30pm	Lunch		
1.30pm	The end of retirement? - Matt Gaden, Challenger		
2.20pm	Labor and the shareholder rights agenda - Stephen Mayne, The Mayne Report		
3.15pm	Closing Address		
3.30pm	Happy Hour		

GUIDE TO THE PROGRAM

ASX SECTORS	PROPERTY
INVESTING IN THE SHARE MARKET	SELF MANAGED SUPER FUNDS
INVESTMENT OPPORTUNITIES	PLENARY SESSIONS
PORTFOLIO MASTER CLASS	OPTIONAL WORKSHOPS



Introduction to investing workshop
Sunday 25 July from 1 to 4.30pm

Presenter: Jamie Nemtsas, Partner & Senior Adviser, Lachlan Partners

New to investing? Need a refresher course? Want to brush up on investment jargon? Then this introductory course will help you. Topics covered will include the asset classes; how to invest in shares; risk v return; portfolio construction; resources available and more. The $45 member registration fee includes papers and refreshments. You do not need to be a conference delegate to attend this workshop.

Introduction to technical analysis workshop
Sunday 25 July from 1 to 4.30pm

Speaker: Neil Godwin, Private trader and personal trading mentor

This workshop is designed to help investors with limited experience of technical analysis. Topics covered include the role of technical analysis; the different types of charts; chart analysis; chart patterns and indicators. The $45 member registration fee includes papers and refreshments. You do not need to be a conference delegate to attend this workshop.

Social functions

Conference registration includes eight happy hour coupons and the three course conference dinner, drinks and entertainment on the Tuesday evening. Non-delegate partners may attend the conference dinner for an additional charge of $110. Happy hour coupons can be used at any of the happy hours on the four days of the conference. Use as many you wish on each of the days and you are welcome to bring your non-delegate partner. The conference is not only educational but socially enjoyable as well.

The optional workshops are extras for which an additional fee applies. See registration details, page 4

Note: All details contained in this advance flier are subject to confirmation and change, except that the dates and venue for the AIA National Investors Conference are fixed. Details will be updated regularly on our website **www.investors.asn.au**.

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PLENARY PRESENTATIONS

The great decoupling

Jonathan Pain, Editor of The Pain Report

The emerging world is clearly driven by the two most populous giants, India and China and the submerging world is represented by nations such as Iceland, Ireland, Spain and the United Kingdom and perhaps even the United States. Where does Australia sit in this new divide between the submerging and the emerging?

The truth about the stockmarket

Marcus Padley, author of the Marcus Today Daily Stockmarket newsletter

Marcus is best know for telling it as it is and in this presentation he will challenge some of your common assumptions about the equity market, blow a few stockmarket myths and teach you a few lessons learnt from his experience.

The economic outlook

Craig James, Chief Economist, CommSec

The Australian economy has hardly missed a beat for almost 20 years despite a raft of challenges posed from overseas. Craig will assess the outlook for the economy including forecasts for interest rates, the dollar and sharemarket. Craig will also focus on some of the longer-term risks and opportunities that the economy faces and assess what they mean for investors.

The need for an investment plan

Colin Nicholson, Author

Colin believes from his own experience that without a sound investment plan investors will be more likely to fail. He also advocates the importance of having the plan in writing. Colin will discuss the risks that should be managed and will provide strategies to help you prepare, implement and evaluate your plan.

What works on Wall Street?

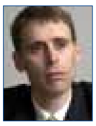
Roger Montgomery

High dividend yields, low P/E's and high PEG ratios are popular but why do the returns merely rise and fall with the market? Should you use charts or fundamentals? Time in the market or timing? What really works on the Australian stock market? Roger will explore the methods many use when attempting to beat the market and then reveal those that do.

The end of retirement?

Matt Gaden, Challenger

2010 is the year where Baby Boomers reach the traditional retirement age of 65. Matt will discuss issues such as public policy strategies that may be required to fund government benefits; just how many people will be retired in the next 10, 20 and 30 years; is Australia unique in facing this challenge, or is this a global phenomenon and how can investors insure against 'longevity risk' to ensure their incomes last.



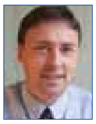
Labor & the shareholder rights agenda

Stephen Mayne, The Mayne Report

With Australia being one of the world's great shareholder nations and a federal election just around the corner, Australia's best known shareholder activist Stephen Mayne will assess the Rudd Government's record on corporate governance, disclosure, class actions, superannuation and executive pay. Do shareholders have the tools necessary to hold boards to account and are they using them effectively?

OTHER PRESENTATIONS

MONDAY 26 JULY 2010



Financial markets as complex adaptive systems 1 & 2

Alan Hull

Alan has done extensive research into analysing price charts as a type of phase space and identifying emergent properties that can be exploited for profit. Understanding financial markets as complex adaptive systems serves to enhance them by identifying which are the most appropriate trading techniques for any given situation. Alan will firstly explain the theory before applying this understanding to the Australian stockmarket.

Opportunities in a changing residential property market

Mike Anderson, Executive Director, Silverhall

Mike will outline new growth regions providing state by state analysis. As with most investing, timing is important and Mike will outline the risks and opportunities in the current residential market and when and why to sell a property.

Profitable investing by following the trend

Justine Pollard, Author, Private Trader & Trading Mentor

Trend following is one of the best tools to manage risk while establishing a portfolio which has a reasonable expectation of making money. Justine will show how investors can profit from applying this simple approach.

Navigating the commercial property recovery

David Hinde, CEO, Orchard Funds Limited

After a period of challenging devaluations and credit restrictions, the commercial property markets have started to show early signs of recovery from the GFC. To take advantage of the next upswing investors should proceed with caution and be aware that the landscape of unlisted and listed property funds has changed.

Selecting stocks for the long-term portfolio

Andrew Doherty, Head of Equity Research, Morningstar

Andrew will highlight methods for selecting stocks for long term performance. These are blue chip stocks considered to be the best businesses and expected to perform well. Andrew will also discuss proven methods for selecting stocks for long term portfolios based on fundamental analysis.

Electricity markets & emissions trading

Tim Nelson, Head of Carbon and Sustainability, AGL Energy

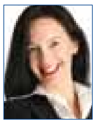
Tim will outline how energy markets operate both within Australia and globally. By understanding the interaction between emissions trading and energy markets investors can make money from this new sector and Tim will show you how.

TUESDAY 27 JULY 2010

CFDs - The facts, the advantages & how to use them

Jim Taig, Managing Director, Seismo Market Solutions

Jim will reveal the advantages of direct market access CFDs verses options and warrants, the critical differences between CFD providers and lesser known vital facts that affect CFD performance.



Using technical analysis to find high probability trades

Louise Bedford, Trading Secrets

If you're serious about investing successfully, and you're ready to take the next step with trading, Louise will outline the opportunities that technical analysis offers the investor not only in timing the buying and selling stages but assisting in risk management. Examples will be used to demonstrate the techniques outlined.

SMSF contribution strategies

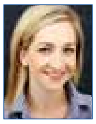
Phillip Whiteley, Director, Super Plus Australia Pty Ltd

Phillip will provide an overview of the current contribution rules including the limits, eligibility to contribute and penalties for getting it wrong. He will then provide worked examples of contribution strategies for employees, the self-employed and investors, including salary sacrificing, personal deductible contributions and more.

ETFs as the core of your portfolio

Robin Bowerman, Head of Retail, Vanguard Investments Australia Ltd

An Exchange Traded Fund (ETF) is a diversified portfolio of securities constructed using an index approach that can be readily traded on the Australian Securities Exchange (ASX). Robin will outline the pros and cons of ETFs and how they can be used in your portfolio to manage risk, lower costs and capture market returns.



SMSF estate planning

Rachael Rofe, Dixon Advisory

Rachael will outline who your super dependants are and how to ensure that control and death benefits pass to the right beneficiaries and in the most tax-effective way. Rachael will also discuss binding super death benefit nominations and how to avoid family disputes.

REITs – is now the time to consider investing?

Warren Boothman, Head of Institutional Business, MacarthurCook Limited

The GFC took the REIT sector to unprecedented lows but we have since seen a degree of recovery? Unlike the last recession, the fall in the value of REITs has had more to do with debt and less to do with property. Is it now time to look at investing in this sector?

WEDNESDAY 28 JULY 2010

Managing risk for profitable investment in the share market

Julia Lee, Equities Analyst, Bell Direct

Investing in the market is uncertain and in fact the only thing that investors can control is how much they can lose. Successful investing is only possible if the risks of investing are managed. Julia will consider the risks that the investor can avoid and those risks which must be managed for successful investing.

Small companies, big opportunities

Elio D'Amato, CEO, Lincoln Indicators

By focusing on the fundamentals, Elio will demonstrate how easy it is to recognise value in the small caps sector to provide his top 10 list. Elio will also highlight the size of the opportunity for investors in the small cap sector, as well as look at the warning signals when assessing businesses in this lucrative, but potentially volatile sector.

Investment strategies for changing markets - *The one conference all investors should attend*

The Australian Investors Association

The AIA is a national, non-profit, independent association of investors dedicated to helping other investors achieve their goals through education and advocacy. The AIA is committed to helping investors in all asset classes and markets, and offer a comprehensive suite of programs and services to all members throughout Australia. These are offered through its many face to face activities, online forums, publications and website www.investors.asn.au.

Non Members

Non members are welcome to attend the conference and will be asked to firstly join the AIA. Subscription for one year is $110.00 or $190 for two years plus a once off $20 joining fee.

Partners

Partners do not need to join the AIA and can attend the conference for $630, irrespective of time of booking. Partner registration includes all benefits as for a regular registration (conference dinner, satchel and provision of happy hour coupons etc).

Early bird discounts

Delegates who register prior to **16 May** will pay $695 and **save $80** on the full $775 registration fee. Fees have been kept the same as for the previous two years.

Tax deductibility

Conference registration fees paid by delegates individually may be tax deductible. Delegates should speak to their tax advisers to confirm deductibility based on their individual circumstances.

Acknowledgement of registration

All registrations will be acknowledged in writing. Registration will only be accepted and confirmed on receipt of payment.

HURRY: REGISTER BY MAY 15 TO RECEIVE EARLY BIRD DISCOUNT!

THREE WAYS TO REGISTER

1. Register online at **www.investors.asn.au**
2. Complete the registration form below and mail or fax to the AIA.
3. Call 1300 555 061

Australian Investors Association Ltd
PO Box 7439
Gold Coast MC Qld 9726
Tel: 1300 555 061
Fax: 07 5597 7892
Email: aia@investors.asn.au

I highly recommend the AIA Conference to anyone who wishes to advance their investment knowledge, as well as meeting a truly friendly cross-section of the community. I was certainly lucky I came across the AIA some 12 years ago! ***Malcolm Robertson***

Registration includes

- **Attendance at sessions and exhibition for the four days 25-28 July**
- **Lunch and refreshments 26-28 July**
- **Eight happy hour coupons for the four days 25-28 July**
- **Conference dinner 27 July (includes beverages & entertainment)**
- **Delegate satchel including conference program & bound speakers' papers booklet**
- **Opportunity to network with other investors**

Surfers Paradise Marriott Resort & Spa

The Marriott Resort & Spa has been designed to reflect the mild Queensland climate and features the soothing effect of water with all ground floor bars and restaurants surrounded by waterscapes. This spreads across a hectare of exquisitely landscaped gardens and includes a five metre deep saltwater lagoon, home to tropical fish. Marriott guests can scuba dive, snorkel and swim through waterfalls into rock grottos and spas. The resort also has a marina, a boardwalk, a network of jogging and walking paths and direct access to beaches.

Surfers Paradise Marriott Resort & Spa is offering conference delegates a special rate of **$200 per room per night** which may be extended pre or post conference, subject to availability. Delegates will be sent reservation details upon receipt of their registration or you can book online via the AIA website.

Cancellations

Should you be unable to attend, a substitute delegate is always welcome to attend. Alternatively, cancellations received in writing before or on 14 July 2010 will receive a full refund less a $75 administration fee.

Registration fee

Registration fee		Places	Total amount
Early bird registration to 15 May	**$695.00**		
Partner rate (irrespective of booking date)	**$630.00**		
Full conference registration from 16 May	**$775.00**		
Additional conference dinner ticket - 27 July	**$110.00**		
***An introduction to investing* workshop - 25 July**	**$45.00**		
***An introduction to technical analysis* workshop - 25 July**	**$45.00**		
1 year subscription for non-members	**$130.00**		
2 year subscription for non-members	**$210.00**		
Total herewith			**$**

Personal and payment details

I will be attending ☐ **Conference dinner 28 July**

Title ________ First name ____________________ Surname ____________________

Preferred name for badge ____

Address ____

Suburb ____________________ Postcode __________ State ____________________

Telephone Business ____________________ Home ____________________ Email ____________________

Partner's name ____________________ Are you a member of the AIA? ☐ Yes ☐ No

Member number ____________________ Special meal requirements - please specify ____________________

Registration amount ____________ Method of payment ☐ Master Card ☐ Visa Card ☐ Cheque

Card number ☐☐☐☐ ☐☐☐☐ ☐☐☐☐ ☐☐☐☐ Expiry date ____________

Name on Card ____________________ Signature ____________________

☐ I do not wish to have my details made available to AIA sponsors.