The Great Repression

ADVISER ONLY FAQS

WHY ARE YOU NO LONGER DOING AN ADVISER ONLY ROADSHOW? DOES THIS REPLACE THE NATIONAL ADVISER ROADSHOW (WITH HAMISH) GOING FORWARDS?

After the couple of years where we have held various events with both advisers and their clients, we have received unanimous positive feedback on the quality of these events. They have assisted in educating advisers and their clients as well as vindicate the qualities of active managers such as Magellan in client portfolios. Finally, these events help serve advisers with their desire to hold client specific events in a cost effective and timely manner. This style of event can be built into an advisers annual service proposition.

WHY DO I NOW HAVE TO PAY TO ATTEND?

We feel that the value of such an event is heightened with the payment of a small amount to attend. It builds certainty and quality and particularly with advisers clients in attendance. We also remind you that 100% of the monies received go to charities.

I WANT TO BRING A LARGE GROUP OF CLIENTS (EXAMPLE >20 PEOPLE) HOW CAN I ENSURE THAT WE ARE ALL SITTING TOGETHER?

We strongly recommend large groups purchase the reserved seating tickets at $75 each as this will enable the booker to select seats together on the seating maps at the time of purchase. It is also advisable to sign up for an Eventopia account when booking for large groups. The benefits are: easy access to all your tickets, the ability to print or email individual tickets to each client, clear visibility of your order summary between now and the event itself.

CAN I RESERVE AN AREA AT THE COCKTAIL RECEPTION FOR MY GROUP?

There will be a range of seating options for the cocktail receptions – from sofas, to high tables, low tables, seating clusters, ottomans etc. They are available on a first come first served basis, and cant be reserved. We are unable to reserve areas for groups, however if your group is particularly large (eg. >50 people) Please contact events@magellangroup.com.au to discuss options.

CAN I BRING A PLACARD OR SIGNAGE TO MARK MY AREA AT THE COCKTAIL RECEPTION SO MY GUESTS CAN LOCATE ME?

Please contact events@magellngroup.com.au to discuss as we will assess these requests on a case by case basis.

WHAT INFORMATION SHOULD I GIVE MY CLIENTS ABOUT THE EVENT ONCE I HAVE BOOKED THE TICKETS?

Please refer to the Adviser Hub on the event website for our checklist on communicating the event to clients.

DO YOU HAVE SPARE COPIES OF THE INVITATION THAT I CAN SEND TO MY CLIENT?

Please refer to the Adviser Hub on the event website for our checklist on communicating the event to clients. We have digital copies of the invitations available for download and hard copy invitations can be ordered as well.

DO I NEED TO BRING THE TICKETS WITH ME ON THE NIGHT FOR ALL MY CLIENTS?

If you are coming with a large group, and have signed up to Eventopia and the time of booking (which we strongly recommend), then you will be able to print or email individual tickets to each clients from your account. We recommend not only emailing tickets to your clients but also bringing hard copies with you on the night as a back up.

HOW WILL MY CLIENT ACCESS THE VENUE WITHOUT THE TICKET? (IF THEY ARE RUNNING LATE)

We will have information desks at each event, where are representatives can verify that you bought a ticket in the Eventopia system. Once your purchase is located in the system, your ticket can be emailed to your phone. You can then be scanned at the door and enter as normal.

If your client is running late it is recommended that you (as the hosting adviser) attend the information desk with your client to confirm you are a client and invited by him/her to attend before the ticket is resent.

CAN MY CLIENTS ATTEND WITHOUT ME (THEIR ADVISER)?

Yes.

CAN I ATTEND WITHOUT CLIENTS? AND IF SO, DO I HAVE TO STILL PAY FOR A TICKET?

Yes. We hope you will take the opportunity to host clients at the event but you are of course welcome to attend alone. You must purchase a ticket to access the event.

WILL THERE BE AN OPPORTUNITY TO INTRODUCE MY CLIENTS TO HAMISH AT THE EVENT?

Yes. At each cocktail reception there will be a chance to talk to Hamish Douglass, Brett Cairns (CEO) and senior members of the investment team in our Speaker Lounge.

WILL HAMISH BE TAKING QUESTIONS AT THE EVENT (Q&A)?

Yes Frank Casarotti will host a Q&A session with Hamish. Questions can be submitted live on the night via our event app (launching in early February). We may also use the app to run live polls on the night so please be sure to download it once we release the details. You can also ask Hamish questions in the speaker lounge after the event.

THE EMAIL SAYS "BY INVITATION ONLY", SO CAN I FORWARD THIS INVITATION TO ANYONE I LIKE APART FROM JUST MY CLIENTS?

Yes please feel free to extend the invitation to friends, colleagues, family members etc. As a client, investor or shareholder of Magellan we warmly welcome anyone you wish to share the experience with.

MY COLLEAGUE DID NOT RECEIVE AN INVITATION BUT WANTS TO ATTEND - ARE YOU ABLE TO SEND HIM/HER AN INVITATION?

Please feel free to extend the invitation to friends, colleagues, family members etc. As a client, investor or shareholder of Magellan we warmly welcome anyone you wish to share the experience with. However if your colleague would like their own personal invitation please ask them to contact events@magellangroup.com.au

WILL THERE BE CPD HOURS ATTRIBUTED TO THE EVENT FOR ADVISERS? HOW MANY?

Magellan plans to have the Great Repression presentation CPD accredited and CPD hours will be available to advisers attending the event (regardless of whether you are hosting clients). Please check this section again in early to mid February 2020 for information on the CPD hours available as well as how to obtain them.

WHICH OTHER MEMBERS OF INVESTMENT TEAM WILL BE PRESENT AT THE EVENT?

These will be confirmed closer to the event but it will be a combination of other portfolio managers and senior analysts

HOW HAVE YOU SELECTED THE SCHOOLS AND UNIVERSITIES THAT HAVE BEEN INVITED TO ATTEND THIS YEAR? WILL YOU BE DOING THE SAME NEXT YEAR? COULD I NOMINATE A SCHOOL?

The schools and universities that have been selected in each city, are ones that Magellan has a close affiliation with – either members of staff attended them, or they may know people attending them presently. The students are studying subjects in the fields of finance, economics or business. If you would like to nominate a school for next year, please contact events@magellangroup.com.au We hope to invite schools and universities next year.

WILL YOU BE HOLDING THE SAME EVENT NEXT YEAR - WHAT DATES?

Yes we intend to make this an annual event in the first half of the calendar year. 2021 dates will be confirmed shortly and updated under this FAQ.