



MEDIA RELEASE

MDRT Senior Women Appointments Reflect Significant Evolution in Financial Services

Wednesday December 4, 2013. In September this year, Bev Carlyon took up the reins as Divisional Vice President of the Million Dollar Round Table (MDRT) The Premier Association of Financial Professionals® Membership & Communications Division 1 and Sue Paterson as Deputy Chairperson for MDRT Australia and in doing so, marked another significant milestone in the history of the international professional association in this country.

Commenting on Bev Carlyon and Sue Patterson's achievements MDRT Australia Chairperson Ross Hultgren said the appointments reflect a deeper and more significant evolution that is occurring within the industry and organisation.

"MDRT members are highly motivated financial services practitioners and entrepreneurs that have joined the global member based association to lift their standards of client service, productivity and professionalism. Within each country, many members seek to give back to MDRT and the industry by volunteering their skills and expertise in leadership, service roles and related activities", said Ross Hultgren.

This year, more than half of MDRT Australia's new members were women and Ross Hultgren expects this trend will increase significantly in the years to come.

He is also confident that the growing number of women members will be mirrored in the organisation's senior leadership ranks both in Australia and internationally.

Bev Carlyon started her financial services career and journey 25 years ago and now has the distinction of being one of the AFA's top 28 longest serving members and the only woman that has achieved the quarter century membership milestone.

It was a natural progression to join MDRT eleven years ago and membership has provided an extraordinary platform upon which Bev has built her Sydney based Integrated Professional Services (IPS) practice.

"Joining MDRT ignited a passion within me to give back to the organisation that gave so much to me and in doing so, provided the opportunity to learn, develop and contribute as past Australian Chairperson, Oceania Chair, various workshops and committees culminating in this year's Divisional Vice President role", said Bev Carlyon.

MDRT has 13 divisions that are comprised for members from across the globe and are responsible for charting the entire organisation's membership activities and events and includes the Annual Meeting, Finance, Membership, School of Business, Principles, Best Practice, Productivity, etc.

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As Division VP 1, Bev is responsible for a committee that comprises representatives from Oceania, North America, China, Middle East (including South Africa) and South Asia. Over the coming 12 months, the committee will be creating and documenting processes that can be applied throughout MDRT to improve productivity and member engagement.

Since becoming MDRT's Australia Deputy Chairperson Sue Paterson has transferred the high level of energy and passion displayed as Queensland Chair and is driving many of the major marketing projects, events and activities that will be delivered in 2014 and beyond.

Sue has had an extensive financial services career and background and is Director of Brisbane headquartered Business Insurance Group (BIG). She is also the Queensland Director for the AFA.

A business insurance specialist providing financial advice to professionals and business owners, Sue and the BIG team are committed to providing the highest levels of advice and ongoing service to ensure that the protection and wealth creation aspirations of clients are achieved.

Currently, Sue is promoting and marketing MDRT's Down Under Tour national roadshow event that will visit all the mainland capital cities in February 2014.

The program of high profile speakers has been developed to showcase MDRT's extensive global resources with content and insight that can be personalized for use by Australian financial advisers.

A real coup for Sue and the organisers of the 2014 MDRT Down Under Tour is MDRT's current global president Michelle Hoesly will be a keynote speaker on the Brisbane and Sydney programs.

Ross Hultgren concluded, "It has always been MDRT's goal to reflect the social values of the clients and communities we serve whilst encouraging members to achieve their full potential as financial service professionals and ambassadors of the industry".

"As a progressive organisation, MDRT will continue to provide opportunities for all to contribute to the long term success of the association by providing an esprit de corps framework for members to participate, share ideas and experiences and in doing so, become the financial service leaders of the future".

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