



BRICK BY BRICK

SHANGHAI 2018

19-22 SEPTEMBER

**BRIAN
FITZPATRICK**
CONFERENCE WORKBOOK
SHANGHAI CHINA
19-22 SEPTEMBER 2018



WELCOME TO SHANGHAI



A NOTE FROM FITZPATRICKS PRIVATE WEALTH CEO, MATT FOGARTY

Welcome to Shanghai and the Fitzpatricks Private Wealth Conference 2018.

This year our conference theme, "Brick by Brick", emphasizes that a great business is built through purpose, dedication, perseverance and grit. Any structure, including a business, needs to be built from the ground up. China is the perfect backdrop for this theme, with a rich history in building and growth, as well as traditions which have stood the test of time.

Our objective of the conference is to blend valuable business sessions with time to share experiences with friends, family and colleagues. Our conference is set in China's showcase city, which is also one of the world's fast-growing and innovative cities to be. What better way to learn, than to be here in Shanghai right now, and immerse yourself in this wonderful cultural learning.



We are delighted to have a number of world class speakers to provide insight, new perspective and hopefully some inspiration for you to takeaway back to Australia. Our program has been designed around carefully selected plenary sessions and workshops.

Milo-Arne Wilkinson joins us on both the first day and on the second day to deliver some very powerful insight into building relationships with clients. Her session on The Power of Perception and the Power of Moments are not to be missed. We are very fortunate to have two China experts, David Thomas and Dr Xisu Wang who will present a very interesting perspective on East meets West. We are delighted to once again run insightful adviser workshops with thanks to Scott Fitzpatrick, Kerrie Anderson, Hayden Griffiths and Virginia Heyer. These sessions are always highly rated and enjoyed. On our last

day we finish with motivational topics led by Future Crunch painting an exciting future and Brian Fitzpatrick providing great insights on high performing teams. These sessions will be inspiring, and you are encouraged to have your partners and children to the conference sessions on the Saturday.

Thank you for your contribution to the Group and our community. I look forward to sharing time with you this week.

Warm regards,

Matt Fogarty
CEO Fitzpatricks Private Wealth



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Agenda



Wednesday 19 September 2018

TIME	ACTIVITY	
8:00am – 12:00pm	Arrival into Shanghai	
1:00pm – 5:00pm	Optional tours (1) Old Shanghai vs New Shanghai (2) Shanghai's new heights - skyscraper tour (3) Venice in Shanghai (4) City adventure tour - sidecar motorbike ride	
5:45pm	Meet at lobby for Shook	Langham lobby
6:00pm – 10:00pm	Welcome reception	Shook, the Bund

Thursday 20 September 2018

6:45am – 7:45am	Tai Chi optional activity	XTD Terrace Langham
8:00am – 8:30am	Arrival & registration	Ballroom A
8:30am – 9:00am	MC conference open, <i>Brian Fitzpatrick</i>	Ballroom A
9:00am – 9:30am	Welcome and business update, <i>John McMurdo & Matt Fogarty</i>	Ballroom A
9:30am – 10:45am	Keynote: Science and power of perception, <i>Milo-Arne Wilkinson</i>	Ballroom A
10:45am – 11:00am	Keynote Q&A, <i>facilitated by Brian Fitzpatrick</i>	
11:00am – 11:15am	Morning tea	Ballroom A foyer
10:30am – 11:30am	Partner: bubbles & sparkles partners and kids	Ballroom B
11:15am – 12:30pm	East meets west, <i>David Thomas & Dr Xisu Wang</i>	Ballroom A
12:30pm – 1:00pm	Reflection on day one, <i>Brian Fitzpatrick</i>	Ballroom A
1:00pm – 1:30pm	Lunch	Ballroom A foyer
1:30pm – 2:30pm	Free time	
2:30pm	Depart for Beaufort Terrace	Langham lobby
3:00pm – 6:00pm	Beaufort Terrace group activities	Beaufort Terrace
6:00pm	Depart for dinner from Beaufort Terrace	
6:30pm – 9:30pm	Dinner	Lost Heaven Silk Road
9:30pm	Depart for Langham	
9:30pm – 11:00pm	After dinner drinks	



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Friday 21 September 2018

TIME	ACTIVITY	
8:00am – 8:15am	Delegate arrival	Ballroom A
8:15am – 9:45am	Workshop: Power of moments, <i>Milo-Arne Wilkinson</i>	Ballroom A
9:45am – 10:00am	Workshop Q&A, <i>Facilitated by Matt Fogarty</i>	Ballroom A
10:00am – 10:15am	Morning tea	Ballroom A foyer
10:15am – 11:50am	Workshop sessions (25 min session each, 5 min swap over time)	
	Workshop session 1 - Expanding your advice horizon <i>Scott Fitzpatrick & Kerrie Anderson</i>	Ballroom A
	Workshop session 2 - Another viewpoint <i>Virginia Heyer</i>	Ballroom A
	Workshop session 3 - Buying and selling, tips and traps <i>Hayden Griffiths</i>	Ballroom A
12:00pm – 12:30pm	Workshop session wrap up – who wants to share? <i>Brian Fitzpatrick</i>	Ballroom A
12:30pm – 1:30pm	Lunch	Ballroom A foyer
1:30pm – 6:00pm	Free time	
6:00pm	Meet for Gala dinner	Langham lobby
6:30pm – 10:00pm	Gala dinner: Night out in old Shanghai	Peace Hall
10:15pm	After dinner drinks	

Saturday 22 September 2018

8:45am – 9:00am	Delegate arrival	Ballroom A
9:00am – 9:45am	Lessons from the Kookabarras, <i>Brian Fitzpatrick</i> partner and kids welcome	Ballroom A
9:45am – 10:00am	Morning tea	Ballroom A foyer
10:00am – 11:45am	Keynote: intelligent, optimistic thinking for the future, <i>Future Crunch</i> partner and kids welcome	Ballroom A
11:45am – 12:00pm	Action stations and conference close, <i>Brian Fitzpatrick</i>	Ballroom A
12:00pm	Check out time	
12:00pm – 1:00pm	Lunch	Ballroom A foyer
1:00pm – 5:00pm	Optional tours	



**STUDY THE PAST
IF YOU WOULD
DEFINE THE FUTURE**

CONFUCIUS

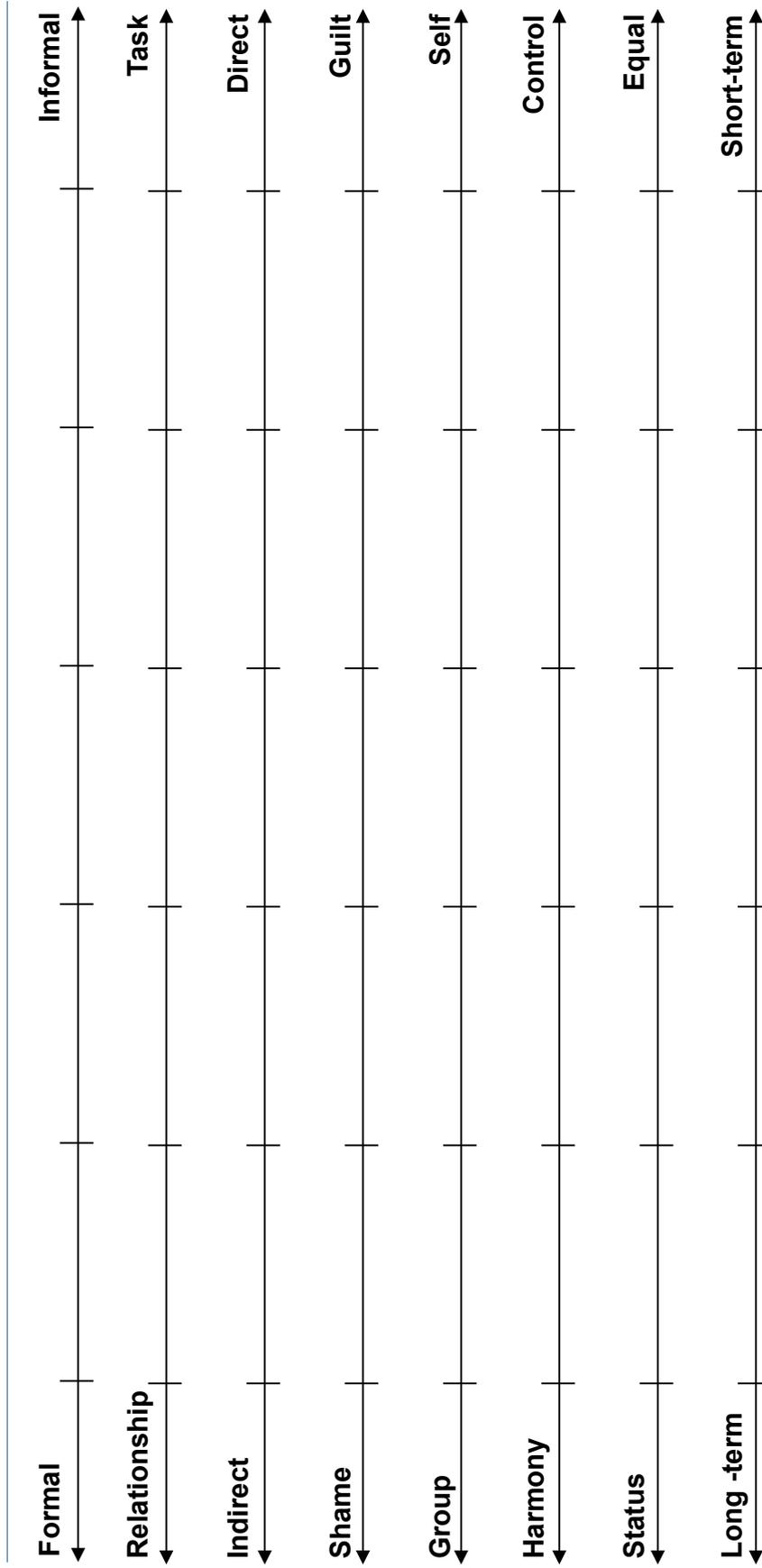
Agenda

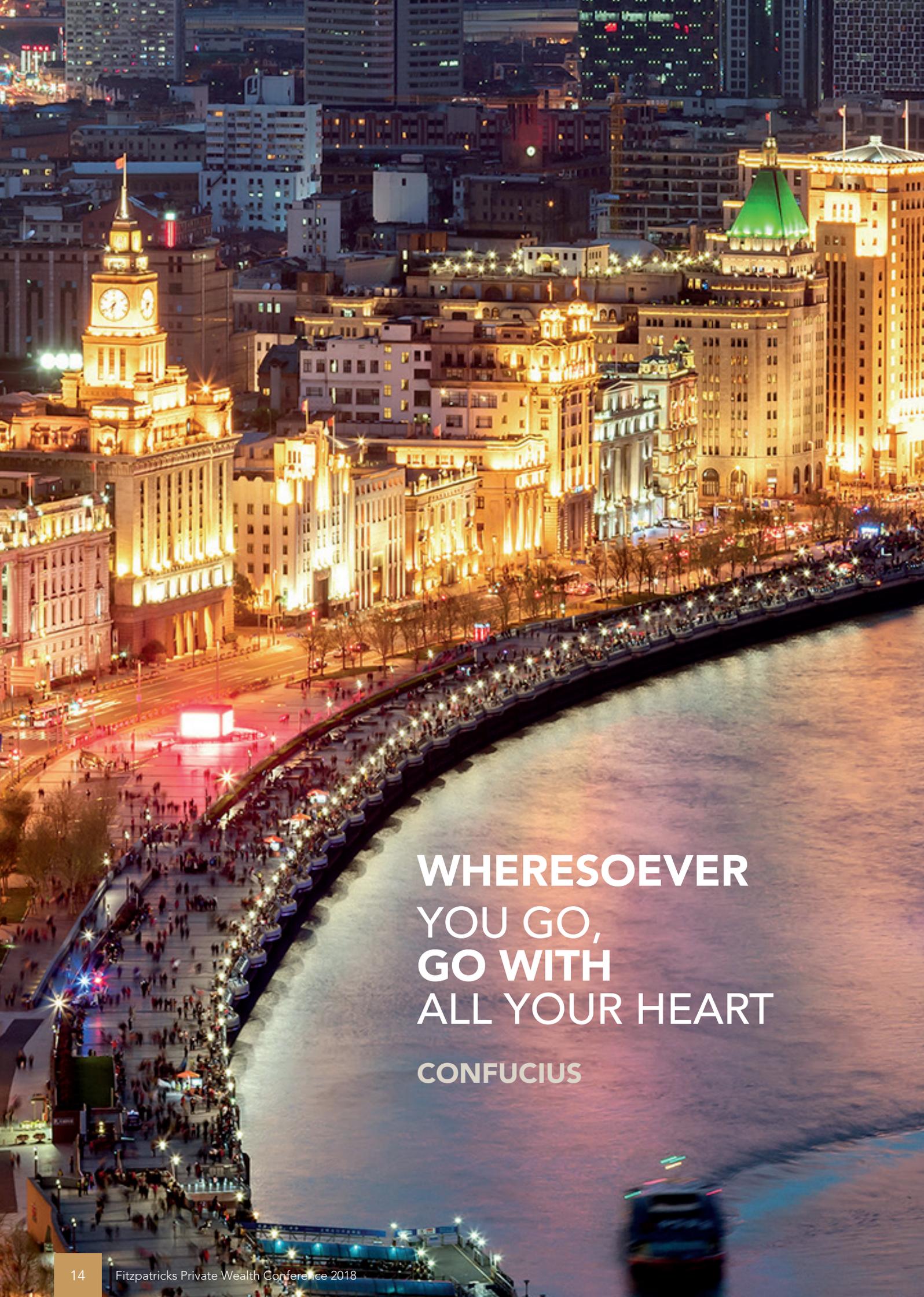


THURSDAY 20TH of September

TIME	ACTIVITY	
6:45am – 7:45am	Tai Chi optional activity	XTD Terrace Langham
8:00am – 8:30am	Arrival & registration	Ballroom A
8:30am – 9:00am	MC conference open, <i>Brian Fitzpatrick</i>	Ballroom A
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1:00pm – 1:30pm	Lunch	Ballroom A foyer
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2:30pm	Depart for Beaufort Terrace	Langham lobby
3:00pm – 6:00pm	Beaufort Terrace group activities	Beaufort Terrace
6:00pm	Depart for dinner from Beaufort Terrace	
6:30pm – 9:30pm	Dinner	Lost Heaven Silk Road
9:30pm	Depart for Langham	
9:30pm – 11:00pm	After dinner drinks	

CULTURAL MINDSET TOOL





**WHERESOEVER
YOU GO,
GO WITH
ALL YOUR HEART**
CONFUCIUS

Agenda



FRIDAY 21ST of September

TIME	ACTIVITY	
8:00am – 8:15am	Delegate arrival	Ballroom A
8:15am – 9:45am	Workshop: Power of moments, <i>Milo-Arne Wilkinson</i>	Ballroom A
9:45am – 10:00am	Workshop Q&A, <i>Facilitated by Matt Fogarty</i>	Ballroom A
10:00am – 10:15am	Morning tea	Ballroom A foyer
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Uniquely SHANGHAI



“ Women rely on themselves and self-reliance is the first lesson for Shanghai women. From the beginning of understanding the matter, the mother and grandmother began to instil in them the concept of everything depends on oneself . ”

Speaking of the most envious of females in the country, Shanghainese women are always winners. Shanghai women are favoured and have a high status. They are the combined result of economic foundation, being self-sufficient and solid family background.

Shanghai men take on most of the household chores – laundry, cleaning, and looking after children. “Home-cooked husbands” rush home after work with big bags and small packets of grocery for the family.

Women, on the other hand, go out to work dressed beautifully every day. When they get off work, they go out shopping with their sisters and enjoy a nice night out.

In 2016, the Shanghai Bureau of Statistics survey showed that

in Shanghai people's minds, Shanghai women's status is viewed as very high.

64% of respondents believe that Shanghai men and women should be equal, 22.1% of people think that Shanghai women have higher status than men, and only 12.6% think that men have higher status.

Women rely on themselves and self-reliance" is the first lesson for Shanghai women. From the beginning of understanding the matter, the mother and grandmother began to instil the concept of "everything depends on oneself.

If you look back, this concept of independence can be traced back to the Ming Dynasty:

At that time, Shanghai was a famous textile center, and

women's income from silk was much higher than that of men's income.

The economic base determines the status of the family. By bringing a large amount of income to the family, women in Shanghai have long been respected by men.

The Report on the Living Conditions of Women in China (2016)" shows that the contribution rate of women to household income is 47.8% nationwide, and the contribution of women in Shanghai to all households in all provinces. The highest rate was 52.4%.

The concept of equality between

Men and Women

Shanghai is the first place in China to be baptized by Western culture, so people in the area have long been exposed to the concept of equality between men and women.

Since the opening of the trade in the mid-19th century, with the development of foreign trade, Shanghai Huayang mixed, merchants gathered, and frequent population movements, with the Western "Ms. Priority", "Equality of Life", "Freedom and Independence", etc. Concept.

Under this influence, Shanghai women began to walk out of the family, and went out to work, sell art, and run the school to make their own living. Among them, many women not only created their own career, but also the pioneer of the feminist movement.

Today's Shanghai women are equally wonderful, not only with high income, but also with better education, positions, and insights than women in other regions.

According to the Shanghai Women's Social Status Survey, 80.4% of women in Shanghai believe that their ability is not worse than that of men, and most of the high-level women have high academic qualifications, high professional titles, and high administrative standards.

Shanghai women in family life. They will try to avoid the time-consuming, energy-consuming and unpleasant things. Shanghai women do less housework, but that doesn't mean they don't care about the family.

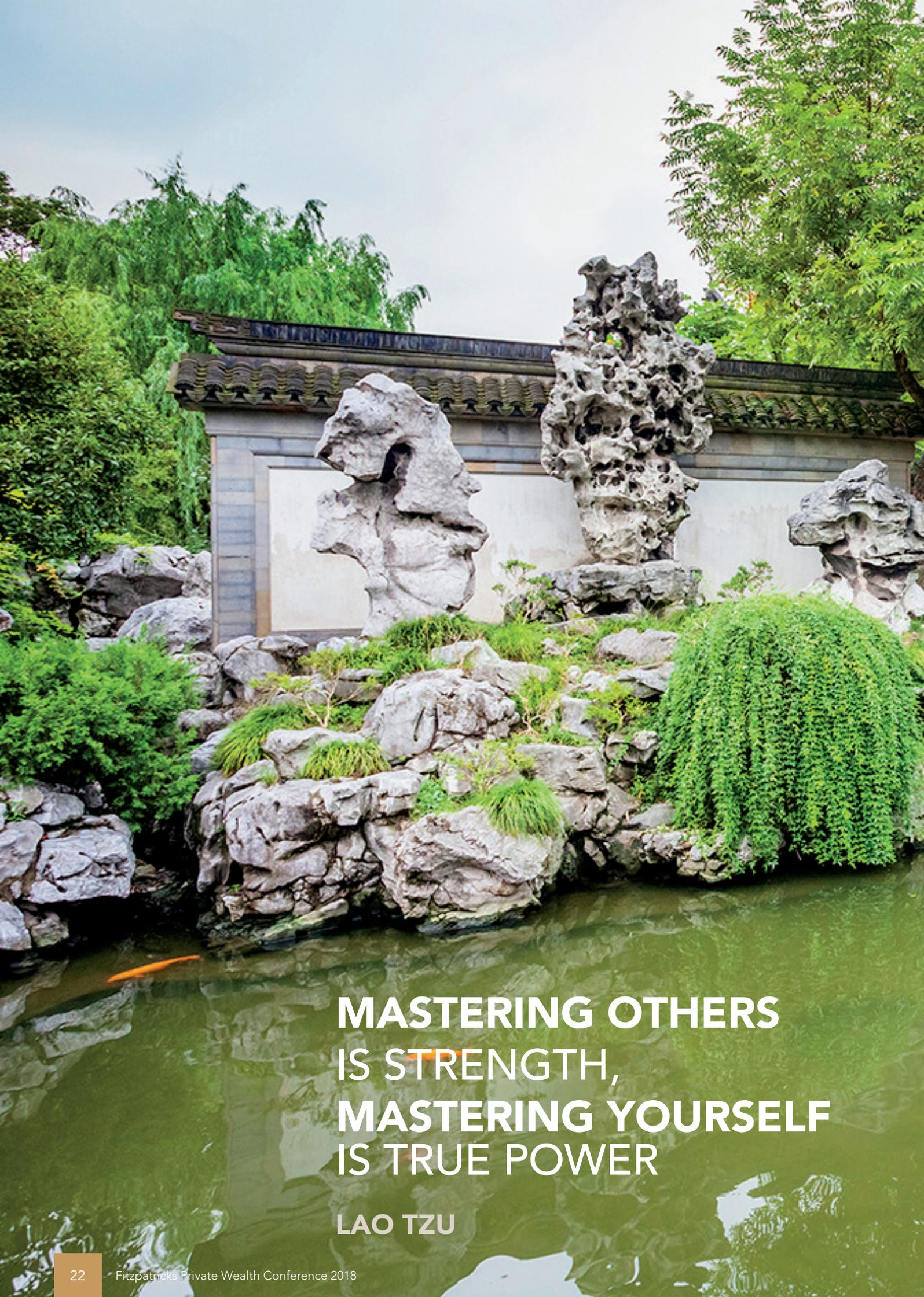


“

80.4% of women in Shanghai believe that their ability is not worse than that of men.

”

Source: Original text in Chinese, <http://m.kdnet.net/share-12527285.html>



**MASTERING OTHERS
IS STRENGTH,
MASTERING YOURSELF
IS TRUE POWER**

LAO TZU

Agenda



SATURDAY 22ND of September

TIME	ACTIVITY	
8:45am – 9:00am	Delegate arrival	Ballroom A
9:00am – 9:45am	Lessons from the Kookabarras, Brian Fitzpatrick partner and kids welcome	Ballroom A
9:45am – 10:00am	Morning tea	Ballroom A foyer
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11:45am – 12:00pm	Action stations and conference close Brian Fitzpatrick	Ballroom A
12:00pm	Check out time	
12:00pm – 1:00pm	Lunch	Ballroom A foyer
1:00pm – 5:00pm	Optional tours	



Action stations

Idea 1

Why is it important to you?

How will I implement?

Idea 2

Idea 3

Local guide



FOOD AND DRINK

China offers a culinary adventure of a magnitude you would expect in a country so large and diverse. Not only are there hundreds of delicious dishes to sample, exploring the cuisine of the different provinces gives an insight into the characteristics of each particular locale. Venues to eat Chinese food in range from opulent restaurants to hawker street stalls. If a place is packed, chances are it is worth trying out the food.

SHOPPING AND MARKETS

South Bund Fabric Market in Shanghai stocks fine fabrics such as silk, cotton, linen, wool, and cashmere at very competitive prices. Many stalls have their own in-house tailors who can make a suit at rates that are less than half what you would pay at retail outlets.



CURRENCY

Yuan, also known as RMB (Renminbi, or "People's Money") come in note denominations of ¥100, ¥50, ¥20, ¥10, ¥5, ¥2, and ¥1, which also appears as a coin. The word yuan is rarely spoken and sums are usually referred to as kuai qian, ("pieces of money") usually shortened to kuai.

If you see anything in the local currency 'yuan', simply divide by 5 and this will roughly be AUD. eg. RMB\$200 equals approximately AU\$40.

SAFETY

Serious or violent crimes against foreigners are very rare but travelers should remain vigilant for petty theft, especially in areas off the beaten tourist track. As a global rule, never leave belongings unattended and always maintain a firm grip on cameras and shoulder bags. Leave expensive valuables at home and always use hotel safety deposits boxes or in-room safes for valuables.



ENTERTAINMENT AND NIGHTLIFE

The entertainment in China is as diverse as the country itself. The big cities are home to sophisticated nightclubs, high-end restaurants and cool bars that reflect the cosmopolitan clientele that inhabit these cities. Smart casual attire is the usual dress code. Other options include cultural shows such as Chinese opera performances, acrobatic shows and martial arts displays. For a more relaxed affair, head to a traditional Chinese tea house.

BUSINESS HOURS

Offices are generally open from 9am to 6pm but are closed Saturday and Sunday. Most shops, restaurants and transport systems offer the same service seven days a week. Shops are typically open from 8am to 8pm.

DOS IN CHINA

- Be punctual as being on time shows respect for other people.
- Remove your shoes when entering a private Chinese home or a temple.
- Always greet the eldest person in a Chinese family first and then everyone else in order of seniority.
- Keep calm when dealing with officials, especially if tense situations arise. Getting angry will lead to an ugly, face-losing situation.
- Present things to people with both hands, to show that what you are offering is the fullest extent of yourself, especially with business cards.
- Eat what your host offers. It is considered rude to refuse.
- Fill your companion's tea cup when it is empty, especially if your companion is older than you. Leave your tea cup half-full if you have had enough.

Useful phrases



DON'TS IN CHINA

- Don't leave your chopsticks upright in your bowl as this action is associated with funerals. Use the special rests provided.
- Don't point the bottom of your shoes/feet at someone.
- Don't point your finger at someone.
- Don't touch someone's head. This is the most sacred part of the body.
- Don't give clocks or books as gifts. The phrase "to give a clock" in Mandarin sounds too much like "attend a funeral" and "giving a book" sounds like "delivering defeat".
- Don't be overtly affectionate in public places.
- Don't discuss local politics or other issues of sensitivity.



Conference contacts



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Destination Asia (China)

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Population of
CHINA



1.4 BILLION

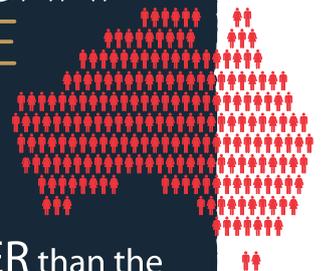
in 2018 1,413,175,739
estimated by
United Nations as
at February 2018.

Population of
AUSTRALIA
24 MILLION
in 2018



24,662,456 estimated
by United Nations as
at February 2018.

Population of
**SHANGHAI
ALONE**



is **GREATER** than the
whole of Australia

HOW BIG IS SHANGHAI?

The population of Shanghai is estimated to be 24.15 million in 2016, which actually declined 0.4% year over year. The city ranks 5th in the world in terms of population, and it has an average population density of 2,059 people per square kilometer. This number increases to 3,854 people per square kilometer in urban areas.

*source: <http://worldpopulationreview.com/world-cities/shanghai-population/>
#source: <http://worldpopulationreview.com/world-cities/beijing-population/>

25 MILLION
POPULATION OF
SHANGHAI IN 2017*

27 MILLION
POPULATION OF
BEIJING#



Delegate List

ANDERSON, Kerrie	KNOX-COOKE, Ethan	HANLEY, Warrick	MCINNES, Duncan	RYAN, Patrick
ANDERSON, Darren	KNOX-COOKE, Lucas	HANLEY, Belinda	MCMURDO, John	FRASER, Judy
BENDEICH, Sam	KNOX-COOKE, Tahlia	HANLEY, Harrison	MOLENAAR, Carl	STALLMAN, John
BENNETT, Mike	DAY, Paula	HANLEY, Imogen	MUSCAT, Shane	STEEL, Lisa
BENNETT, Nadine	DIX, David	HANLEY, Tahlia	O'CALLAGHAN, Denis	TAINSH, Jonathon
KING, Lynette	DUNCOMBE, Bobbe-lee	HARMON, Cody	O'CALLAGHAN, Bronwyn	THOMAS, Robert
BENNETT, Jack	DUNCOMBE, Anthony	GODDARD, Jessica	ORDELMAN, Adam	WANG, Julia
BENNETT, Lily	DUNCOMBE, Benjamin	HEYER, Virginia	PALMA, Robert	WOODLEY, John
BENNETT, Emma	DUNCOMBE, Darcy	CLISBY, Trevor	PARRETT, Marcel	
BOLD, Colin	DY, Tam	HONE, Alex	POST, Jayden	
BOUGHTON, Heather	EDWARDS, Tony	HUGHES, Francesca	PRIESTLEY, Alfred	
LEE, Robyn	ETHERINGTON, Daniel	JURSON, Aynsley	REILLY, Glen	
BOYCE, Andrew	FITZPATRICK, Brian	JURSON, Robert	CARBIS, Melinda	
CASE, Shane	FITZPATRICK, Liz	KERRY, Luke	RICHARDS, Benjamin	
CASE, Sharlene	FITZPATRICK, Scott	KERRY, Nonie	RICHARDS, Victoria	
CLYNES, Justin	FOGARTY, Matt	LEVIN, Simeon	RICHARDS, Joshua	
CLYNES, Kylie	GENNUSA, Leonard	LEWIN, Mark	RICHARDS, Lachlan	
COOK, Anthony	LAUGHTON, Natasha	LEWIN, Sonja	RICHARDS, Peter	
COOK, Kym	LAUGHTON, Margaret	LIM, Sidney	ROBERTS, Paul	
COOKE, Martin	GENNUSA, Illyra	MANALLACK, Beverley	ROBERTS, Melissa	
KNOX, Sarah	GENNUSA, Jackson	MANALLACK, Stephen	ROSS, Robert	
COOKE, Maureen	GRIFFITHS, Hayden	MCINNES, Carmel	ROSS, Sarah	





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19-22 SEPTEMBER

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FITZPATRICKS PRIVATE WEALTH CONFERENCE

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