

Friday 12 June 2015

## **World's leading finologist to headline AFA roadshow**

One of Australia's largest superannuation funds, Sunsuper, is joining forces with the Association of Financial Advisers (AFA) to bring world renowned US-based psychologist and PortfolioConstruction Forum's recently appointed Chief Finology Officer, Dr David Lazenby, to Australia for the AFA National Roadshow in July.

Dr Lazenby is a world renowned performance psychologist with 15 years' experience working with financial institutions and insurance companies on issues such as finology and behavioural finance. He has also worked with the US Federal Reserve, as well as many Fortune 100 executives and global financial services firms.

His background in finology has made him an expert in financial planning experience and advice processes design, as well as improving advice models through superior communication with clients.

Sunsuper's National Manager, Retail Distribution and Advice, Anne Fuchs, said Sunsuper was delighted to play a role in partnering with the AFA to bring PortfolioConstruction Forum's Dr Lazenby to Australia.

"Dr Lazenby is truly a world renowned expert in the study of finology and the psychology of money. His views on positioning financial advice in a way that takes into account human behaviour and investors' relationships with money can add real value to the lives of clients, and support wealth creation in a way that also makes for sustainable advice practices in the future," Ms Fuchs said.

Brad Fox, Chief Executive of the AFA emphasised the importance of bringing finology to the forefront of financial advice, and acknowledged the thought leadership and collaboration with Sunsuper and PortfolioConstruction Forum.

"Dr Lazenby will open up the financial advice profession's thinking around the interaction between client behaviour and strategic financial advice. Finology offers advisers an opportunity to refine their competitive advantage versus the direct and indirect advice alternatives being presented to the community," said Mr Fox.

"The AFA sees a strong alignment with our education philosophy of balancing academic rigour with practical application and connecting knowledge with adviser performance".

Dr Lazenby will hold a two hour interactive workshop "Finology Forum: Conversational methods that accelerate trust" as part of the AFA National Roadshow which will be held at various locations across the country in the last two weeks of July.

Registrations for the AFA National Roadshow are open now at [www.afa.asn.au](http://www.afa.asn.au)

**ENDS**

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## **Background information**

### About Sunsuper

Sunsuper is one of Australia's largest super and retirement businesses managing \$32 billion in funds under management for 1.2 million members.

### About PortfolioConstruction Forum

PortfolioConstruction Forum is the independent continuing professional development service for Australia's and NZ's investment portfolio construction practitioners.

### About David Lazenby

Dr David Lazenby is a licensed psychologist with a PhD in counselling and performance psychology. He is a leading expert in financial planning experience design, taking psychology from academic theory to the real world to help wealth professionals develop their "bedside manner", human relations skills, systems thinking and scenario planning techniques and tools.

For over 30 years, he has guided Fortune 100 executives, global financial services firms, financial planning start-ups, professional athletes and US Navy SEALs and pilots. He has consulted to the US Federal Reserve and sits on three family firms' investment committees that oversee US\$8bn in investments.

In 2015, Dr Lazenby joined PortfolioConstruction Forum as Chief Finology Officer, with the brief of overseeing PortfolioConstruction Forum's finology curriculum.

### About Finology

Finology is the emerging (and converging) research field covering the study of minds, customs and behaviours with respect to money. It incorporates behavioural finance, and much, much more.

### About the AFA

The Association of Financial Advisers Limited (AFA) has been the authentic voice on the value of financial advice for over 65 years. Today, the AFA is a vibrant, innovative association, where the underlying driver of policy is the belief that great advice transforms lives. To this end the AFA is striving to achieve the vision of 'great advice for more Australians'. The AFA's ongoing relevance as a professional association is derived from our success in engaging with the major stakeholders in financial advice including advisers, consumers, licensees, product and service providers, and the regulator and government. Culturally we believe in the value of collaboration to create powerful outcomes and this drives how we achieve influence and work towards our vision.