

AUSTRALIAN MARKETING INSTITUTE - BRAND FINANCE  
BRAND FINANCE FORUM™  
5 AUGUST 2008 | AMORA JAMISON HOTEL, SYDNEY

# Leveraging Marketing Assets

*A unique event bridging the business  
of marketing and finance*



A JOINT INITIATIVE BY



AUSTRALIAN  
MARKETING  
INSTITUTE





*“Understanding the role of the brand in the generation of profit is vital to all businesses. The Brand Finance Forum helped to create a breakthrough for my company.”*

Raoul Pinnell, Former Chairman,  
Shell Brands International AG

## Leveraging Marketing Assets

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The value of many companies is largely comprised of marketing assets. They are crucial to generating demand, and can be pivotal to transactions, investor relations, financial reporting and tax. The creation and protection of brand, reputation and customer value requires co-ordinated input from senior executives in all of these disciplines.

- CFOs are faced with impairment risks as well as transfer pricing and structured finance considerations that require an understanding of marketing assets
- It is essential that marketers are aware of the full range of opportunities and risks facing marketing assets, if they are to participate in corporate strategy
- Deal makers increasingly need to gauge the value potential of intangible assets in assessing the viability of a transaction.

The Australian Marketing Institute - Brand Finance Forum™ brings together a unique combination of speakers to explore how the value of marketing assets can be protected and leveraged. The event flows from the Brand Finance Forum™ that has been held at the London Stock Exchange since 2004.

Both your finance and marketing teams will benefit from attending the Brand Finance Forum™. Delegates will have the opportunity for discussion with the panel of internationally recognised speakers.

We look forward to joining you at the Forum in August to ensure you are leveraging your marketing assets.



Roger James FAMI CPM  
Chairman, Australian Marketing Institute



Tim Heberden AFAMI CPM  
Managing Director, Brand Finance (Australia)

Brand Finance’s study of the 25 leading stock markets, covering 99% of global listed value, highlights the importance of intangible assets.

Effective management of brands and other intangibles is critical to business performance and value creation.

**Intangibles 66%**

**Net Tangible Assets 34%**



*“I can make a whole lot more money skilfully managing intangible assets than managing tangible assets.”*

Warren Buffet, CEO Berkshire Hathaway



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8.30 - 8.45	Registration	
8.45 - 9.00	<b>Roger James</b> Chairman, Australian Marketing Institute	Forum Opening
	<b>Tim Heberden</b> Managing Director, Brand Finance (Australia)	Introduction from the Conference Chair: Australia's Performance in the World of Intangibles

**Managing Brands for Value**

9.00 - 9.40	<b>David Wheldon</b> Global Director of Brand, Vodafone Group	Leveraging a Global Brand
9.40 - 10.20	<b>Angus McKay</b> Chief Financial Officer, Foster's Group	The CFO's Role in Brand Management
10.20 - 10.40	Panel	Q & A
10.40 - 11.00	Morning Tea	

**Maximising Customer Value**

11.00 - 11.40	<b>Professor Adrian Payne</b> University of New South Wales and Cranfield University, UK	A Practical Guide to Maximising Customer Lifetime Value
11.40 - 12.20	<b>Professor Don Schultz</b> Northwestern University, USA	Determining Customer Value: Forms and Formats
12.20 - 12.35	Panel	Q & A
12.35 - 1.30	Lunch	

**Leveraging Intangibles Through Transactions**

1.30 - 2.10	<b>Anthony Kerwick</b> Managing Director, Pacific Equity Partners	Private Equity's View
2.10 - 3.00	<b>David Haigh</b> Chief Executive, Brand Finance PLC (London)	Identifying and Exploiting Hidden Value
3.00 - 3.10	Panel	Q & A
3.10 - 3.30	Afternoon Tea	

**What the Board and Investors Need to Know**

3.30 - 3.40	<b>Richard F E Warburton AO</b> Company Director	Session Introduction
3.40 - 4.10	<b>Naseema Sparks</b> Director, Blackmores Ltd and Mitchell Communication Group	Bringing Marketing Assets into the Boardroom
4.10 - 4.40	<b>Mark Gell</b> Global Head of Strategic Marketing and Communications, Lend Lease Corporation	Investor Relations Perspective
4.40 - 4.50	<b>Rohan Gallagher</b> Managing Director, Credit Suisse Equities	The Analyst's Perspective
4.50 - 5.30	Panel Discussion led by Richard Warburton	Q & A
5.30	Conference Chair	Forum Closing
5.30	Networking Drinks	



**David Wheldon**

Global Director of Brand, Vodafone Group  
Prior to joining Vodafone, David Wheldon has held senior positions on both sides of the marketing fence. Starting at Saatchi & Saatchi, he was then appointed Managing Director of Lowe Howard-Spink in London. He later moved to the role of Global Director and VP of Advertising for the Coca-Cola Company under the aegis of Sergio Zyman. David then returned to the agency world as President of BBDO Europe and finally arrived at Vodafone via WPP.



**Angus McKay**

Chief Financial Officer, Foster's Group  
Angus McKay was appointed Chief Financial Officer of Foster's Group in January 2008, after holding the positions of Vice President, Corporate; Finance Director, Carlton and United Beverages Ltd; and Director, Finance Australia, Asia and Pacific since joining Foster's in 2004. Angus has over 20 years of Australian and international experience in senior finance roles at Fonterra, Diageo and IBM Australia.



**Don E. Schultz**

PhD, Professor (Emeritus-in-Service) of Integrated Marketing Communications, The Medill School, Northwestern University, USA  
In addition to his academic appointments, Professor Schultz has advised blue-chip companies around the world. He is President of the consulting firm Agora Inc, and Chairman of Brand Finance Inc. Don is the author of fourteen books and is referred to as 'the father of integrated marketing'.



**Adrian Payne**

PhD, MSc, MEd, FRMIT, FCIM, FRSA, Professor of Marketing, Australian Business School, University of New South Wales and Visiting Professor, Cranfield University, UK  
Professor Payne recently returned to Australia after twenty years of lecturing, consulting and research in Europe. He is an authority on Relationship Marketing and CRM. Adrian has advised major corporations in Australia, Europe and Asia and was Chief Executive of a manufacturing company.



**Anthony Kerwick**

Managing Director, Pacific Equity Partners  
Anthony Kerwick joined Pacific Equity Partners in 1999 and became Managing Director in 2004. Anthony currently serves on the board of Tegel Foods, Griffin's Foods, Godfreys and Veda Advantage. Prior to joining Pacific Equity Partners, Anthony was a consultant at Bain and Company in the United States and Australia, where he advised clients in a wide range of sectors.



**David Haigh**

Chief Executive, Brand Finance PLC (London)  
David Haigh is an internationally recognised expert in valuing and leveraging brands. He is a Chartered Accountant and Fellow of the Chartered Institute of Marketing. David started his career at PwC, and held finance director roles before leading Interbrand's brand valuation practice. He founded Brand Finance in 1996. David is an expert witness on brand valuation for Inland Revenue and the IRS. He advises leading brand owners, private equity firms and IP lawyers, and has lectured at leading universities, including Harvard and London Business School.



**Naseema Sparks**

Director, Blackmores Ltd and Mitchell Communication Group  
Naseema Sparks most recent executive position was as Managing Director of M&C Saatchi, one of the world's leading branding and advertising businesses. Naseema resigned from M&C Saatchi in 2007 to pursue a career as a non-executive director. Her current directorships include Blackmores, Mitchell Communications Group and Racing Victoria.



**Mark Gell**

Global Head of Strategic Marketing and Communications, Lend Lease Corporation  
Mark Gell joined Lend Lease in February 2008 following over 25 years in the government, banking and business sectors for companies such as OneSteel, Citibank, ANI, TNT, Boral and Telstra. He has held senior general management positions in strategy, public policy, investor relations, marketing and corporate affairs.



**Rohan Gallagher**

Managing Director, Credit Suisse Equities  
Rohan Gallagher is a Chartered Accountant and spent the first 6 years of his career at Price Waterhouse, before becoming an analyst at Bankers Trust Australia. In 1996 he moved to Credit Suisse Australia Equities where he is now Managing Director and senior lead analyst across the Paper & Packaging, Chemicals and Builders sectors. During his 9 years at Credit Suisse, Rohan has been a top three rated analyst across all three industry sectors.



**Richard F E Warburton AO**  
Company Director

Richard Warburton is currently Chairman of Tandou Ltd, Magellan Flagship Fund Ltd and The Board of Taxation. He is a Director of Note Printing Australia and Citigroup Pty Ltd. He also serves as a Director on the Advisory Board of The Garvan Research Foundation, the Macquarie Graduate School of Management and is Chairman of the Commonwealth Studies Conference.



*“Since 2004 the Brand Finance Forum has provided a unique opportunity to pool the thinking of Finance and Marketing. This is essential for the development of marketing dashboards and other metrics initiatives.”*

Tim Ambler, Senior Fellow, London Business School and author of *Marketing and the Bottom Line*

*“The Brand Finance Forum is the only event I ever recommend to my senior colleagues, as they are always brilliantly informative, bang up to date and provide delegates with lots of useful actionable propositions”*

Malcolm McDonald, Emeritus Professor, Cranfield University and author of *Marketing Due Diligence*

*“The Brand Finance Forum was a valuable opportunity to tune-in to what people are thinking and the tools they are developing in the new brand centric era.”*

Fernando Martins, Executive Vice President, Brand Strategy and Marketing Communications, Banco Real, São Paulo, Brasil

*“The Brand Finance Forum was very valuable. The discussions were rich and provided a good opportunity to learn from what other companies are doing.”*

Jose Risoul, Corporate Brand Director, Cemex



### Brand Finance

Brand Finance is an international leader in quantifying and leveraging the value of intangible assets. We advise organisations across a wide range of sectors on how to maximise shareholder value through effective management of their intangible assets. Brand Finance was founded in 1996, and now has offices in sixteen countries.

Our services complement and support each other, resulting in an in-depth understanding of intangible assets from financial, consumer and commercial perspectives:

**Valuation:** We are an international leader in the field of intangible asset valuation and transfer pricing.

**Analytics:** We help companies quantify the return on marketing investment and track brand performance with Brand Investment Dashboards.

**Strategy:** We use value-based marketing tools to enable management to allocate marketing resources to activities that create the most value.

**Transactions:** We help clients extract value from their intellectual property through acquisitions, sales, licensing and structuring.

Brand Finance has worked with many of the world’s leading brand owners. We also advise private equity companies, investment banks, intellectual property lawyers and tax authorities in Australia, the US and the UK.

Brand Finance (Australia) Pty Ltd  
Level 7, 234 George Street  
Sydney NSW 2000  
Tel: +61 2 9252 3441  
www.brandfinance.com

Specialist in adding intangible value

□ Valuation □ Analytics □ Strategy □ Transactions

Amsterdam Bangalore Barcelona Colombo Dubai Geneva  
Istanbul London Moscow New York Paris Sao Paulo  
Singapore Sydney Toronto Zagreb

### Australian Marketing Institute

The Australian Marketing Institute (AMI) is the professional association for marketers and has served Australian industry and the profession for over 70 years, making it one of the oldest professional associations in Australia.

The Australian Marketing Institute offers its members:

- A respected and authoritative voice for the profession
- Strong advocacy of the highest standards in marketing
- The opportunity to achieve career advancement and enhanced credibility in the profession through professional development programs, access to the latest information on marketing practice and networking with fellow practitioners.

The Australian Marketing Institute is helping achieve industry and community recognition for professional marketers through the Certified Practising Marketer (CPM) program. The CPM certification serves as the professional benchmark and distinguishes the truly qualified marketer.

For further information about the Australian Marketing Institute and the Certified Practising Marketer (CPM) program contact:

Australian Marketing Institute  
PO Box 7443  
Melbourne VIC 3004  
Tel: 1300 737 445  
Fax: 1300 131 468  
Email: membership@ami.org.au  
Website: www.ami.org.au

Value Creation Through Marketing



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## HOW TO REGISTER

### ONLINE

For online registrations please visit  
[www.ami.org.au](http://www.ami.org.au)

### TELEPHONE

Please have your credit card details  
ready to quote.

TEL **1300 737 445**

### FAX

Complete and send this registration  
form to:

FAX **1300 131 468**

### MAIL

Complete and mail this registration  
form together with payment to:

2008 Brand Finance Forum  
Australian Marketing Institute  
PO BOX 7443  
MELBOURNE VIC 3004

Registrations without payment will not be processed. Delegates must sign the form to validate the registration. Should you be unable to attend, a substitute delegate is always welcome at no extra charge. Alternatively, a full refund, less a \$164 (including GST) service charge, will be made for cancellations in writing (email or fax) up to two (2) weeks prior to the event. Confirmation of your registration will be sent via email. Please ensure you have provided your email address details.

### ONSITE REGISTRATIONS

Name badges and conference proceedings can be collected from the conference desk on Tuesday 5 August 2008 from 8:30am.

### PRIVACY CLAUSE

Please note that details of conference delegates may be made available to sponsors at this event for marketing purposes. If you do not wish this to happen, please indicate:  
 I do not wish to have my details made available to sponsors at this event.

### How did you find out about this conference?

- AMI mail-out
- Email
- Professional Marketing magazine
- Radio
- Web
- Word of mouth
- Other \_\_\_\_\_

## AUSTRALIAN MARKETING INSTITUTE - BRAND FINANCE BRAND FINANCE FORUM™

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## REGISTRATION FORM & TAX INVOICE

Australian Marketing Institute ABN 30 000 026 586. This form constitutes a Tax Invoice upon receipt of payment.

### 1. YOUR DETAILS

(Please use a separate form for each delegate. This form may be photocopied)

Title	First Name	Last Name	
_____ Organisation			
_____ Position			
_____ Address			
		City	State Postcode
_____ Tel		_____ Mobile	
_____ Email			

### 2. CHOOSE YOUR REGISTRATION

The CPM rate is for AMI Members who have qualified for and attained Certified Practising Marketer [CPM] Status.

	CPM	AMI MEMBER	NON-MEMBER
1 DAY FORUM	<input type="checkbox"/> \$1,295	<input type="checkbox"/> \$1,395	<input type="checkbox"/> \$1,595

DIETARY REQUIREMENTS : Please advise the Event Manager if you have any special dietary requirements

DRESS CODE : Business Attire

### 3. PAYMENT DETAILS

#### CREDIT CARD

AMEX  VISA  DINERS  MASTERCARD

#### CHEQUE

(Payable to 'Australian Marketing Institute')

\_\_\_\_\_  
Credit Card Number

\_\_\_\_\_  
/ Expiry

\_\_\_\_\_  
Name on Card

\_\_\_\_\_  
Signature