

MATTHEW BURGESS



MATTHEW BURGESS

BUSINESS FOUNDER

AUTHOR

ENTREPRENEUR

www.matthewburgess.com.au

KEY INFORMATION

Around 20 years of proven results in helping advisers improve performance

Regular favourite at leading conferences

Guaranteed results focused content, supported by publications and an unrivalled webbased platform

LEGAL

ENTREPRENEURSHIP

THE DREAM ENABLER

MATTHEW BURGESS

Having presented over 100 seminar and training programs a year every year since 2001, Matthew Burgess has carved out an enviable reputation.

Matthew presents for many industry associations, accounting firms, financial advisers and commercial businesses both in purely technical areas for advisers as well as more practically focused sessions for clients directly. In recent years, an increasing focus of Matthew's presenting has been *The Dream Enabler*. This series of presentations leverage the unprecedented access to the philosophies of extraordinarily successful entrepreneurs Matthew has worked for.

Following the outstanding business success that Matthew has enjoyed and the ideation, creation and successful launch of ground breaking new business models, Matthew has also developed a number of 'adjacent' speaking areas to his strict legal discipline.

MATTHEW'S THREE SPEAKING PLATFORMS:

LEGAL

ENTREPRENEURSHIP

THE DREAM ENABLER

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Being a true disciple of the '10,000-hour rule' (as popularised by Malcolm Gladwell in his book 'Outliers'), Matthew has already achieved 10,000 hours of presentation time.

Having also achieved the critical 10,000-hour mark in his legal practice, and in time spent working with entrepreneurs, Matthew combines these passions to deliver a truly unique and memorable offering.

Traditionally, the focus of Matthew's presentations has been on technical legal issues and he enjoys a reputation as one of Australia's most highly regarded tax and estate planning lawyers, as confirmed by his listing as one of the country's 'Best Lawyers' in trusts and estates.

Over time however, Matthew has gained increasing exposure from those wanting him to present in his other areas of specialisation.

Matthew has shared the stage as either a co-presenter, host or on the same overall program with a diverse range of some of

Australia's leading personalities, including David Koch (Kochie from Channel 7 Sunrise program), legendary Australian cricket captain and philanthropist, Steve Waugh AO, media personality Dr Feelgood, leading entrepreneurs such as Euan Murdoch (Herron Pharmaceutical), Skroo Turner (Flight Centre), Dr Betty Byrne Henderson AM (Byrne Ford) and Zimi Meka (Ausenco) as well as leaders of industry such as Doug McTaggart (former CEO of QIC), Keith De Lacy (former chairman of Macarthur Coal), Phil Ruthven (chairman of IBIS World) and Michael Chaney AO (longstanding former managing director of Wesfarmers, former director of BHP and current chairman of NAB).

Matthew is experienced in virtually every form of presentation environment, including:

- training programs
- conference plenary sessions
- client seminars
- webinars
- live video and web enabled links
- television
- radio
- after dinner speaking

- keynote speaking
- event hosting
- panel hosting
- talk show style interviewing
- workshops and courses
- technical lectures

Matthew is grateful for the support of a diverse range of organisations that engage him, including:

- three of the five leading banks
- every leading national tax body
- various law societies
- a number of independent professional service firms (including in the law)
- the Television Education Network
- numerous insurance groups
- broking houses
- financial planning organisations
- a number of listed companies
- countless small to medium enterprises in a diverse range of industries.

MATTHEW BURGESS

Matthew guarantees the tailoring at any presentation to meet your objectives and available time allocation. The topics forming the core of Matthew's presentations in his three areas of specialisation are summarised below. For session overviews of any topic please email - bookings@matthewburgess.com.au.

LEGAL

- tax and estate planning
- business succession
- trusts
- group restructures
- asset protection
- family succession planning
- SME tax planning
- web-based legal delivery
- superannuation

ENTREPRENEURSHIP

- value pricing
- delegation and leveraging of intellectual property
- web based business development and monetisation
- team development without traditional management structures
- modern management for professional firms
- outsourcing, offshoring and regourcing
- presentation and selling skills
- marketing (including social media)
- studies of success in business

THE DREAM ENABLER

- the 3 P's - *purpose, passion and persistence*
- the 3 L's - *leverage, law and learning*
- the 3 I's - *incubate, invest and inspire*



MATTHEW BURGESS

E: mwb@matthewburgess.com.au

M: 0403 209 977

"Matthew is a leading expert in his field and is always open to sharing his vast knowledge in the areas of tax, succession and estate planning to drive better succession outcomes for clients. His ability to translate complex legal issues into solutions is exceptional and is evidenced by the consistent positive feedback we receive from our clients on Matthew's content and presentations."

- *Olivia Romano*

*Manager Risk Specialist Network
MLC Advice Services | MLC & NAB Wealth*

"I highly recommend Matthew's services to other organisations wanting to add value to their customer proposition."

- *Tara Moffatt*

Marketing Adviser, Suncorp

"Brilliant in all aspects."

"Very energetic - get him back!"

"What a great presenter!"

"Absolutely fabulous."

- *Attendees*

National Convention for The Tax Institute

MATTHEW BURGESS

TESTIMONIALS

Since 2014, Matthew Burgess has been a Certified Speaking Professional® (CSP), a designation conferred by the Professional Speakers Australia (PSA), the industry's leading organisation. CSP is the speaking profession's international measure of professional platform competence.

Matthew is counted among the rare 12 percent of professional speakers worldwide who currently hold this credential.

His CSP status recognises that Matthew has spent a minimum of five years running a highly performing speaking platform. It shows that he has likewise consistently achieved the highest standards set by in-depth peer reviews,

demonstrating superior competence in professional standards such as:

1. Platform skills
2. Business management
3. Education
4. Professional Speakers Australia participation

A selection of the feedback Matthew received from attendees a recent National Convention for The Tax Institute is below:

- Loved his unique style! Kept you focused for the whole session.
- Nice to encounter a lawyer with a personality and a sense of humour.
- Very entertaining.
- A very entertaining presentation.
- Brilliant speaker!

- Very informative in a light hearted way!
- Absolutely fabulous
- Excellent speaker. Made a legal topic interesting to an accountant.
- Matthew is a very good speaker and knowledgeable.
- Excellent knowledge, expertise and presentation.
- Excellent! Lively presentation, very informative and entertaining - 10/10.
- Brilliant in all aspects.
- Kept it interesting and alive. Very good at keeping the interest.
- A real breath of fresh air from a lawyer, no less!
- Very informative and engaging. Best presenter so far.
- Very entertaining.
- Matthew is both entertaining and knowledgeable.

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TESTIMONIALS CONT.

Suncorp have engaged Matthew Burgess of McCullough Robertson Lawyers to speak at many of our client seminars and professional development days. Matthew presents estate planning information in a dynamic and interesting way, leaving the audience wanting more. Feedback on his presentations is overwhelmingly positive, with comments including:

“Great public speaker”

“Easy to listen to, very entertaining”

“New information, well presented”

“Fun, interesting and pertinent”

“I highly recommend Matthew’s services to other organisations wanting to add value to their customer proposition.”

Tara Moffatt
Marketing Adviser, Suncorp

“I thought your facilitation was very well done ... the depth of specialist knowledge and the enthusiasm of your team was well demonstrated. My interest arose because I’m on some family company boards and am a non-executive director of FINH.”

John Lyons
Independent Company Director

“As manager of the Risk Specialist Network which is a risk and succession specialist division of MLC, I have worked with Matthew over a number of years and in every instance he has been extremely professional and has exceeded expectations on delivering content, insights and presentations for our advice business clients.

Matthew is a leading expert in his field and is always open to sharing his vast knowledge in the areas of tax, succession and estate planning to drive better succession outcomes for clients. His ability to translate complex legal issues into solutions is exceptional

and is evidenced by the consistent positive feedback we receive from our clients on Matthew’s content and presentations.

Throughout Matthew’s working relationship with the Risk Specialist Network and MLC, he has been instrumental in transforming the way succession advice is provided to clients by our advisers and has significantly improved the quality of advice outcomes in these areas. Matthew’s unwavering focus on quality client outcomes and experiences position him as a unique professional in this field as he is always looking to innovate and find the best possible solution for his clients.

I would highly recommend Matthew as an exceptional advice professional who is refreshingly collaborative, innovative and always looking to deliver significant value and outcomes for his clients.”

Olivia Romano Manager Risk Specialist Network
MLC Advice Services | MLC & NAB Wealth

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MATTHEW BURGESS – BIO

Matthew Burgess is one of the four directors and founders of specialist firm View Legal whose mantra is to build the firm their friends would choose.

Having the opportunity to help clients achieve their goals is what he is most passionate about.

Matthew always works in conjunction with trusted advisers (whether it be accountants, financial advisers or other lawyers) and their clients. This collaborative approach helps ensure ways we found to fundamentally improve the value received by advisers, and in turn their clients, and have led Matthew to develop numerous game changing models. Examples include providing guaranteed upfront fixed pricing, founding what is

widely regarded as Australia's first virtual law firm, and more recently, developing a platform that gives advisers access to market leading advice and support for less than \$1 a week.

Matthew's specialisation in tax, structuring, asset protection, estate and succession planning has seen him recognised by most leading industry associations including the Tax Institute, the Weekly Tax Bulletin and in the 'Best Lawyers' list for trusts and estates.

Work is one aspect of his life Matthew loves, so there is no need to be constantly searching for 'balance'. His other great loves are:

1 Family – they are profiled in various ways through the series of

children's books he has written under the pseudonym 'Lily Burgess' – seen in various TV commercials; and www.wordsfromdaddysmouth.com.au

2 Learning – going cold Turkey on television and most forms of media in late 2005 has radically increased Matthew's ability to study the great authors and inspired him to publish a book that explores the concept of 'true success' – see www.thedreamenabler.com.au

3 Health – aside from being a foodie and swimming at least 5km a week, Matthew installed a stand up workstation in 2007 and among a few other lifestyle choices, it changed his life.

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MATTHEW BURGESS – CV

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Leveraging off the extraordinary business success that Matthew has enjoyed and the ideation, creation and successful launch of ground breaking new business models Matthew has also developed a number of programs sharing knowledge in a number of 'adjacent' areas to his strict legal discipline. Matthew's three speaking platforms are:

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BIO – STAGE INTRODUCTION

Matthew's passion is helping clients successfully achieve their dreams.

Since the 1990's, Matthew has specialised in tax, estate and succession planning, and provides strategic advice to business owners and high net worth individuals.

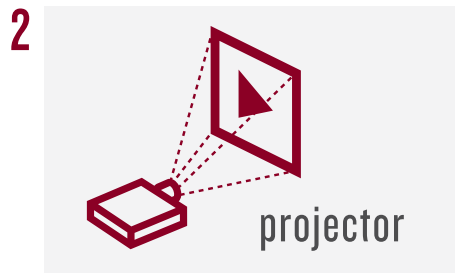
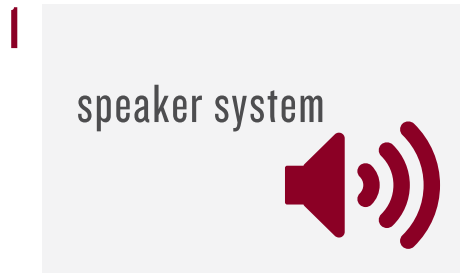
In part leveraging off the skills he has developed working in the SME market space, Matthew has been the catalyst in developing a number of innovative solutions for advisers and their clients; including founding Australia's first virtual law firm.

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AV & STAGE REQUIREMENTS

Every presentation by Matthew Burgess will be designed to maximise the investment return for those in attendance. To ensure the audiovisual arrangements complement the overall presentation, Matthew will bring his own computer (generally a Surface tablet) with the necessary adapters and presentation material. A separate copy of the presentation will be available on USB stick. Electronic copies of any slides will be made available to those in attendance, where appropriate, a designated private web page will be provided during the presentation, and this will give access to an electronic copy of Matthew's latest book.

The particular requirements for each presentation obviously vary depending on the room and likely audience size, however generally as a minimum include:



PRE-PRESENTATION Q&A FOR PRESENTATION BY MATTHEW BURGESS

bookings@matthewburgess.com.au

QUESTION

ANSWER

Organiser's name	
Conference date	
Time of presentation	
Event manager	
Mobile number	
Email address	
Dress code	
Theme of day	
Chair of Matthew's session	
What takes place before Matthew's speech?	
What takes place after Matthew's speech?	
Length of Matthew's speech	
Is there to be separate time allocated for questions?	
Will there be a panel?	
How many audience members will there be in Matthew's presentation?	
How many people are registered in the conference as a whole?	
What are the major objectives of the conference (list up to 3)?	
What are the major objectives for Matthew's session (up to 3)?	

QUESTION

ANSWER

Where is a copy of the conference program available (e.g. web address)?	
Are there other speakers that have presented on a topic similar to the one you are envisaging for Matthew here?	
How did you find out about Matthew?	
Why did you choose Matthew?	
Would you like to discuss providing all attendees with copies of Matthew's publications (articles, books, apps, or DVDs) or web-based training programs?	
Have you addressed all items on Matthew's AV & stage requirements checklist?	