



FINANCIAL STANDARD
SMILEYS
Q&A

2013 SOCIAL
MEDIA INFLUENCE,
LEADERSHIP +
EXCELLENCE
SCHOLARSHIP

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David Rae

Director, Beames & Associates

Entrant in last year's Smiley's talks to *Financial Standard* about how entering gave his social media clout a shot of credibility.

After working for KPMG Peat Marwick and Credit Suisse Asset Management Australia Limited, David decided he wanted to get more balance in his life. He chose to join Beames & Associates because of its reputation for quality service, and its balanced approach to work and life. His ability and experience in financial planning saw him become a partner in 2003.

David graduated from Macquarie University with a Bachelor of Economics (Accounting) in 1995 and has a Graduate Diploma of Financial Planning from the Securities Institute of Australia. He is a member of the Financial Planning Association of Australia Limited and has achieved Certified Financial Planner status. He is a Fellow of the Financial Services Institute of Australasia and an authorised representative of Count Financial

Tell me why you decided to enter the Smileys
On the day the email first went out about the awards I received 3 or 4 emails from people telling me I should enter. So I did!

Tell me a little about your application

I found that it was a reasonably easy application to complete. Being focussed on social and digital media, there were lots of links to my various social media sites and pages.

What effect did entering the Smileys have on your business?

The social and digital space is still pretty new for advisers. There are still plenty of people who are sceptical of the value. It gave a lot of credibility to the work I had been doing.

Has your social media strategy and presence changed over the past year?

It has certainly changed and will continue to evolve. It is such a fast moving space I don't think you will ever be able to say you've nailed it and don't need to change. I'm continually looking at improving what I do and for new ideas.

How has social media impacted your business?

It has significantly improved the efficiency of what I do. I use videos and blog posts to explain key strategies and build them into our client communications. It has created a culture of innovation which has encouraged us to continually look to improve what we do.

What are your latest discoveries on social media, any new favourite things?

It's early days but I'm enjoying playing around with short video messages on Vine and Instagram.

What role does social media play in the financial services industry?

I think the key areas are creating connecting, sharing ideas and improving communication and engagement with clients. I have created some fantastic connections with advisers, industry leaders and media that would not have occurred without social media. **FS**