



Sorted Seminar Facilitators

This list of facilitators includes Facilitators, Financial Advisors, Community & Budget Advisors and Adult Educators. The Commission's Quality Assurance Framework for Sorted Facilitators defines the standards and enables the assessment of the facilitation process. The Framework enables us to recruit, train, deliver, observe, assess, report on and ensure best practice facilitation of our Sorted Financial Capability Seminars. Sorted Facilitators may charge between \$0 and \$500 to deliver a seminar, depending on what's involved in the delivery and how many participants attend the Seminar.

Anyone providing a Sorted Seminar must agree to deliver the information in a way that is neutral and impartial; and not to endorse or refer people to products, services or providers.

Interested in becoming a Sorted Seminar Facilitator?

The Commission for Financial Capability (www.cffc.org.nz) runs an annual application process each year. Please send your contact details to us at office@sorted.org.nz and we will contact you when the application process opens.

Find a Sorted Seminar Facilitator

Organisation	Type	Facilitators	Area(s) serviced	Sorted seminars offered	Contact details
Nationwide					
Skills4Work	Educator	Desiree Gelbart Jeanette Lask Joanna Hayman	Nationwide	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing 	Name: Desiree Gelbart City: Auckland Tel: (09) 588 5100 Mob: 027 481 1025 Email: d.gelbart@skills4work.org.nz Website: www.skills4work.org.nz
ANZ	Financial Services Provider	Trisha Edmonds Mary Potter	Nationwide	<ul style="list-style-type: none"> • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Trisha Edmonds City: Christchurch Tel: (03) 368 2526 Mob: 021 343 171 Email: trisha.edmonds@anz.com Website: www.anz.co.nz
Truly Independent Financial Advice NZ Ltd	Financial Advisor	Austin Fisher	Nationwide	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Austin Fisher City: Auckland Tel: (09) 473 3384 Mob: 022 109 2240 Email: austinfisher@xtra.co.nz Website: www.tifanz.co.nz

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North Island					
Simply Budget	Budget Advisor & Educator	Christine Liggins	Greater Auckland	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Christine Liggins City: Auckland Tel: (09) 425 9500 Email: info@simplybudget.co.nz Website: www.simplybudget.co.nz
Joseph Liava'a	Facilitator	Joseph Liava'a	Auckland	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Joseph Liava'a City: Auckland Mob: 0276330017 Email: Joseph.liavaa@gmail.com
Knowledge Base Central	Educator	Rosa Chow	Greater Auckland	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Rosa Chow City: Auckland Tel: Mob: Email: Website: www.knowledgebasecentral.co.nz

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Hazel Balderston	Facilitator	Hazel Balderston	Auckland	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Hazel Balderston City: Auckland Mob: 022 680 5663 Email: hazelbalderston@gmail.com
Ochre Business Solutions	Educator	Leisa Nathan John Donaldson	Greater Auckland Waikato Bay of Plenty	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Leisa Nathan City: Auckland Tel: (09) 360 1993 Mob: 021 352 325 Email: leisa@ochrebusiness.com Website: www.ochrebusiness.com
Stuart Gaze	Facilitator, Budget Advisor	Stuart Gaze	Auckland	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Stuart Gaze Location: Auckland Tel: 09570923 Email: admin@homebudget.org.nz

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Franklin Family Support Trust	Budget Advisor	Olive Matheson-Croudis Vicky Mee	Franklin area, Pukekohe, Waiuku, Tuakau and Northern Waikato	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Wendy Gillespie City: Franklin, Auckland Tel: (09)238 6233 Mob: 021 417 010 Email: generalmanager@familysupport.org.nz Website: www.familysupport.org.nz
Leonie Adams	Educator, Facilitator	Leonie Adams	Northlands (Kaitaia & Far North)	<ul style="list-style-type: none"> • Saving and Investing • Getting ahead • Setting goals, making a budget • Tackling debt • Retirement planning • KiwiSaver • Financing a home 	Name: Leonie Adams City: Kaitaia Tel: 021 162 4004 Email: leonieadams@xtra.co.nz
Just Effective Training (JET)		Valerie West	Northlands		Name: Valerie West City: Awanui Tel: 0212 346 782 Email: valerie.west@xtra.co.nz

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George Vea	Facilitator	George Vea	Auckland	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: George Vea City: Auckland Tel: 021755208 Email: georgevea@icloud.com
HighPoint Academy	Educator	Stephen Parr Peggy MacKenzie	Central North Island Waikato Bay of Plenty	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Stephen Parr City: Tauranga Tel: (07) 578 5975 Mob: 027 433 8834 Email: stephen@highpointacademy.co.nz Website: www.highpointacademy.co.nz
Sylvia Bowden	Facilitator	Sylvia Bowden	Bay of Plenty	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Sylvia Bowden City: Tauranga Tel: (07) 544 6174 Email: sylvia@silbo.co.nz Website: www.kidsandmoney.co.nz

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Tauranga Budget Advisory Service	Budget Advisor	Diane Bruin Debbie Green Jeannine Dunn	Bay of Plenty including Whakatane and Rotorua	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Diane Bruin City: Tauranga Tel: (07) 578 0969 Mob: 027 294 4580 Email: info@tgabudget.org.nz Website: www.tgabudget.org.nz
Morton Delany Investment Consulting	Financial Advisor	Sarah Delany	Central North Island Waikato, Bay of Plenty Taupo Wellington	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Sarah Delany City: Taupo Tel: (07) 378 9444 Mob: 027 559 1535 Email: sarah@mortondelany.co.nz Website: www.mortondelany.co.nz
Jane Crosbie	Facilitator	Jane Crosbie	Waikato	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Jane Crosbie Location: Waikato Tel: 021 528555 Email: janecrosbieartist@gmail.com

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Cultivate Tribe/TWR Coaching	Educator, facilitator	Natasha Willison-Reardon	Waikato, Hamilton	<ul style="list-style-type: none"> • Saving and Investing • Getting ahead • Setting goals, making a budget • Tackling debt • Retirement planning • KiwiSaver • Financing a home 	Name: Natasha Willison-Reardon City: Hamilton Tel: 0210 2914 094 Email: cultivatetribe@gmail.com
Raylee Price		Raylee Price	Waikato, Hamilton		Name: Rayylee Price City: Te Awamutu Tel: 027 245 5475 Email: kune_rd@xtra.co.nz
Ingrid Derbyshire	Facilitator	Ingrid Derbyshire	Gisbourne region	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Ingrid Derbyshire Location: Gisbourne Tel: 027 656 7878 Email: pderbyshire@ihug.co.nz

Organisation	Type	Facilitators	Area(s) serviced	Sorted seminars offered	Contact details
Training Ventures Limited	Educator	Jeanette Hall	Wairarapa (Eketahuna, Masterton, Carterton, Greytown, Martinborough, Featherston)	<ul style="list-style-type: none"> • Saving and Investing • Getting ahead • Tackling debt • Retirement planning • KiwiSaver • Financing a home 	Name: Jeanette Hall City: Masterton Tel: 06 377 3378 Email: jeanette@xtra.co.nz Website: www.trainingventures.co.nz
Moneymax	Financial Advisor	Liz Koh	Wellington to Palmerston North and Wanganui.	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Liz Koh City: Paraparaumu, Wellington Tel: 0800 273 847 Mob: 021 313 339 Email: liz.koh@moneymax.co.nz Website: www.moneymax.co.nz
Advice First	Financial Advisor	Bernard Long	Palmerston North/ Horowhenua	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Bernard Long City: Palmerston North Tel: (06) 356 9878 Mob: 027 448 6937 Email: bernard.long@advicefirst.co.nz Website: www.advicefirst.co.nz

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Esther Garland	Facilitator	Esther Garland	Palmerston North Wellington	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Esther Garland City: Palmerston North Tel: (06) 354 9000 Email: garland@infogen.net.nz
Stapleton Financial Solutions	Financial Advisor	John Stapleton	Nationwide	<ul style="list-style-type: none"> • Think, Shrink and Grow • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: John Stapleton City: Wellington Tel: (04) 977 3877 Mob: 022 358 8962 Email: jstapleton6@gmail.com
Jigsaw Financial Solutions	Financial Advisor	Sharon Giblett	Nationwide	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Sharon Giblett City: Tauranga, Wellington, Lower Hut Tel: 0800 JIGSAW Mob: 021 566 869 Email: Sharon.giblett@jigsawsolutions.biz Website: www.jigsawsolutions.biz

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The Training Company	Educator	Robyn Forryan	Auckland	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing • Retirement planning 	Name: Robyn Forryan City: Milford, Auckland Tel: (09)486 6255 Email: ref@xtra.co.nz
Foxplan	Financial Advisor	Sally Killick	Wellington	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Sally Killick Location: Wellington Telephone: 04 9184621 Email: sally.killick@foxplan.nz
South Island					
Nelson Budget Service	Budget Advisor	Marina Gosnell Lisa Dyer Rosalie Grant	Nelson/Tasman	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing 	Name: Marina Gosnell City: Nelson Tel: (03) 546 9021 Email: marina@nelsonbudget.co.nz Website: www.nelsonbudget.co.nz

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Jac Lockington	Financial Advisor, Educator, Facilitator,	Jac Lockington	Blenheim, Kaikoura, Picton, Seddon	<ul style="list-style-type: none"> • Saving and Investing • Getting ahead • Setting goals, making a budget • Tackling debt • Retirement planning • KiwiSaver • Financing a home 	Name: Jac Lockington City: Blenheim Tel: 027 249 7917 Email: jaclockington@gmail.com Website: www.moneycoaching.nz
Buller Rural Education Activities Programme (REAP) Inc.	Educator	Rachel Hill	West Coast including Karamea, Granity, Westport, Reefton, Maruia, St Arnaud and Murchison	<ul style="list-style-type: none"> • Think, Shrink and Grow 	Name: Deirdre McGrath City: Westport Tel: (03) 789 7659 Mob: 021 035 3074 Email: manager@bullaerreap.co.nz Website: www.bullaerreap.co.nz
Unicia Veer	Chartered Accountant, Budget Advisor & Educator	Unicia Veer	Christchurch and surrounding areas, including Rangiora, Rolleston, Darfield and Kaipoi	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Unicia Veer City: Christchurch Tel: 021 025 44735 Email: unicia.veer@googlemail.com

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Hayden Gardner	Authorised Financial Advisor	Hayden Gardner	Christchurch and surrounding areas	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Hayden Gardner Location: Christchurch Tel: 0274 476 717 Email: hayden@nzprivatewealth.co.nz
Chris Jones		Chris Jones	Christchurch, Canterbury, Culverden, Hanmer, Maruia, Murchison, Reefton.	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Manage debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Chris Jones Location: Christchurch Tel: 0800 456 637 (0800 4 JONESY) Email: chris@swis.co.nz
Mark Smith	Facilitator	Mark Smith	North Otago	<ul style="list-style-type: none"> • Think, Shrink and Grow • Set your goals, make a budget • Managing debt • Saving and investing • KiwiSaver – basics • KiwiSaver – making decisions • Retirement planning 	Name: Mark Smith City: Oamaru Tel: 027 6782571 Email: markofsmith@gmail.com

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Mylrea Bell		Mylrea Bell	Central Otago, Queenstown Lakes, South Westland, South Canterbury		Name: Mylrea Bell City: Wanaka Tel: 027 443 9942 Email: myl@xtra.co.nz
School of Thought	Facilitator	Peter Waaka	Central Otago, Queenstown Lakes District & Southland	<ul style="list-style-type: none"> • Budgeting • Managing Debt • Savings • Set Your Goals • Kiwi Saver • Insurance • Investment • Retirement Planning 	Name: Peter Waaka City: Queenstown Tel: 021 949 915 Email: peterwaaka@xtra.co.nz
Jubilee Budget Advisory Service Limited	Budget Advisors & Educators	Sharon Soper Darlene Coomer	Invercargill and surrounding areas	<ul style="list-style-type: none"> • Budgeting • Managing Debt • Savings • Set Your Goals • Kiwi Saver • Insurance • Investment • Retirement Planning 	Name: Sharon Soper City: Invercargill Tel: (03) 214 0942 Email: sharon@jubileebudget.co.nz