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

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<th>Organisation</th>
<th>Type</th>
<th>Facilitators</th>
<th>Area(s) serviced</th>
<th>Sorted seminars offered</th>
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<tr>
<td>Nationwide</td>
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<tr>
<td>Skills4Work</td>
<td>Educator</td>
<td>Desiree Gelbart</td>
<td>Nationwide</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing</td>
<td>Name: Desiree Gelbart&lt;br&gt;City: Auckland&lt;br&gt;Tel: (09) 588 5100&lt;br&gt;Mob: 027 481 1025&lt;br&gt;Email: <a href="mailto:d.gelbart@skills4work.org.nz">d.gelbart@skills4work.org.nz</a>&lt;br&gt;Website: <a href="http://www.skills4work.org.nz">www.skills4work.org.nz</a></td>
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<tr>
<td>ANZ</td>
<td>Financial Services</td>
<td>Trisha Edmonds, Mary Potter</td>
<td>Nationwide</td>
<td>• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Trisha Edmonds&lt;br&gt;City: Christchurch&lt;br&gt;Tel: (03) 368 2526&lt;br&gt;Mob: 021 343 171&lt;br&gt;Email: <a href="mailto:trisha.edmonds@anz.com">trisha.edmonds@anz.com</a>&lt;br&gt;Website: <a href="http://www.anz.co.nz">www.anz.co.nz</a></td>
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<td>Truly Independent Financial Advice NZ Ltd</td>
<td>Financial Advisor</td>
<td>Austin Fisher</td>
<td>Nationwide</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Austin Fisher&lt;br&gt;City: Auckland&lt;br&gt;Tel: (09) 473 3384&lt;br&gt;Mob: 022 109 2240&lt;br&gt;Email: <a href="mailto:austinfisher@xtra.co.nz">austinfisher@xtra.co.nz</a>&lt;br&gt;Website: <a href="http://www.tifanz.co.nz">www.tifanz.co.nz</a></td>
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<td>Simply Budget</td>
<td>Budget Advisor &amp; Educator</td>
<td>Christine Liggins</td>
<td>Greater Auckland</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Manage debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Christine Liggins&lt;br&gt;City: Auckland&lt;br&gt;Tel: (09) 425 9500&lt;br&gt;Email: <a href="mailto:info@simplybudget.co.nz">info@simplybudget.co.nz</a>&lt;br&gt;Website: <a href="http://www.simplybudget.co.nz">www.simplybudget.co.nz</a></td>
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<td>Joseph Liava’a</td>
<td>Facilitator</td>
<td>Joseph Liava’a</td>
<td>Auckland</td>
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<td>Name: Joseph Liava’a&lt;br&gt;City: Auckland&lt;br&gt;Mob: 0276330017&lt;br&gt;Email: <a href="mailto:Joseph.liavaa@gmail.com">Joseph.liavaa@gmail.com</a></td>
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<td>Knowledge Base</td>
<td>Educator</td>
<td>Rosa Chow</td>
<td>Greater Auckland</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Rosa Chow&lt;br&gt;City: Auckland&lt;br&gt;Tel:&lt;br&gt;Mob:&lt;br&gt;Email:&lt;br&gt;Website: <a href="http://www.knowledgebasecentral.co.nz">www.knowledgebasecentral.co.nz</a></td>
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<td>Hazel Balderston</td>
<td>Facilitator</td>
<td>Hazel Balderston</td>
<td>Auckland</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Hazel Balderston&lt;br&gt;City: Auckland&lt;br&gt;Mob: 022 680 5663&lt;br&gt;Email: <a href="mailto:hazelbalderston@gmail.com">hazelbalderston@gmail.com</a></td>
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<td>Ochre Business Solutions</td>
<td>Educator</td>
<td>Leisa Nathan John Donaldson</td>
<td>Greater Auckland Waikato Bay of Plenty</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Leisa Nathan&lt;br&gt;City: Auckland&lt;br&gt;Tel: (09) 360 1993&lt;br&gt;Mob: 021 352 325&lt;br&gt;Email: <a href="mailto:leisa@ochrebusiness.com">leisa@ochrebusiness.com</a>&lt;br&gt;Website: <a href="http://www.ochrebusiness.com">www.ochrebusiness.com</a></td>
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<td>Stuart Gaze</td>
<td>Facilitator, Budget Advisor</td>
<td>Stuart Gaze</td>
<td>Auckland</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Manage debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Stuart Gaze&lt;br&gt;Location: Auckland&lt;br&gt;Tel: 09570923&lt;br&gt;Email: <a href="mailto:admin@homebudget.org.nz">admin@homebudget.org.nz</a></td>
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| **Franklin Family Support Trust**  | Budget Advisor | Olive Matheson-Croudis, Vicky Mee | Franklin area, Pukekohe, Waiuku, Tuakau and Northern Waikato | • 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) | • 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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</table>
| George Vea         | Facilitator| George Vea            | Auckland                  | • Think, Shrink and Grow                                                                                                                                                                                               | 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 | • 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](http://www.highpointacademy.co.nz) |
| Sylvia Bowden      | Facilitator| Sylvia Bowden        | Bay of Plenty              | • 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](http://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 | • 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](http://www.tgabudget.org.nz) |
| Morton Delany Investment Consulting | Financial Advisor         | Sarah Delany         | Central North Island Waikato,  
Bay of Plenty Taupo Wellington | • 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](http://www.mortondelany.co.nz) |
| Jane Crosbie                        | Facilitator               | Jane Crosbie         | Waikato                                  | • 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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<td>Cultivate Tribe/TWR Coaching</td>
<td>Educator, facilitator</td>
<td>Natasha Willison-Reardon</td>
<td>Waikato, Hamilton</td>
<td>• Saving and Investing&lt;br&gt;• Getting ahead&lt;br&gt;• Setting goals, making a budget&lt;br&gt;• Tackling debt&lt;br&gt;• Retirement planning&lt;br&gt;• KiwiSaver&lt;br&gt;• Financing a home</td>
<td>Name: Natasha Willison-Reardon&lt;br&gt;City: Hamilton&lt;br&gt;Tel: 0210 2914 094&lt;br&gt;Email: <a href="mailto:cultivatetribe@gmail.com">cultivatetribe@gmail.com</a></td>
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<tr>
<td>Raylee Price</td>
<td>Raylee Price</td>
<td>Waikato, Hamilton</td>
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<td>Name: Raylee Price&lt;br&gt;City: Te Awamutu&lt;br&gt;Tel: 027 245 5475&lt;br&gt;Email: <a href="mailto:kune_rd@xtra.co.nz">kune_rd@xtra.co.nz</a></td>
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<tr>
<td>Ingrid Derbyshire</td>
<td>Facilitator</td>
<td>Ingrid Derbyshire</td>
<td>Gisbourne region</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Manage debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Ingrid Derbyshire&lt;br&gt;Location: Gisbourne&lt;br&gt;Tel: 027 656 7878&lt;br&gt;Email: <a href="mailto:pderbyshire@ihug.co.nz">pderbyshire@ihug.co.nz</a></td>
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| Training Ventures Limited    | Educator            | Jeanette Hall      | Wairarapa (Eketahuna, Masterton, Carterton, Greytown, Martinborough, Featherston) | • 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.          | • 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                          | • 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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<tr>
<td>Esther Garland</td>
<td>Facilitator</td>
<td>Esther Garland</td>
<td>Palmerston North Wellington</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Esther Garland&lt;br&gt;City: Palmerston North&lt;br&gt;Tel: (06) 354 9000&lt;br&gt;Email: <a href="mailto:garland@infogen.net.nz">garland@infogen.net.nz</a></td>
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<td>Stapleton Financial Solutions</td>
<td>Financial Advisor</td>
<td>John Stapleton</td>
<td>Nationwide</td>
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<td>Name: John Stapleton&lt;br&gt;City: Wellington&lt;br&gt;Tel: (04) 977 3877&lt;br&gt;Mob: 022 358 8962&lt;br&gt;Email: <a href="mailto:jstapleton6@gmail.com">jstapleton6@gmail.com</a></td>
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<td>Jigsaw Financial Solutions</td>
<td>Financial Advisor</td>
<td>Sharon Giblett</td>
<td>Nationwide</td>
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<td>Name: Sharon Giblett&lt;br&gt;City: Tauranga, Wellington, Lower Hut&lt;br&gt;Tel: 0800 JIGSAW&lt;br&gt;Mob: 021 566 869&lt;br&gt;Email: <a href="mailto:Sharon.giblett@jigsawsolutions.biz">Sharon.giblett@jigsawsolutions.biz</a>&lt;br&gt;Website: <a href="http://www.jigsawsolutions.biz">www.jigsawsolutions.biz</a></td>
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<td>The Training Company</td>
<td>Educator</td>
<td>Robyn Forryan</td>
<td>Auckland</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing&lt;br&gt;• Retirement planning</td>
<td>Name: Robyn Forryan&lt;br&gt;City: Milford, Auckland&lt;br&gt;Tel: (09)486 6255&lt;br&gt;Email: <a href="mailto:ref@xtra.co.nz">ref@xtra.co.nz</a></td>
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<td>Foxplan</td>
<td>Financial Advisor</td>
<td>Sally Killick</td>
<td>Wellington</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing&lt;br&gt;• KiwiSaver – basics&lt;br&gt;• KiwiSaver – making decisions&lt;br&gt;• Retirement planning</td>
<td>Name: Sally Killick&lt;br&gt;Location: Wellington&lt;br&gt;Telephone: 04 9184621&lt;br&gt;Email: <a href="mailto:sally.killick@foxplan.nz">sally.killick@foxplan.nz</a></td>
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<tr>
<td>Nelson Budget Service</td>
<td>Budget Advisor</td>
<td>Marina Gosnell, Lisa Dyer, Rosalie Grant</td>
<td>Nelson/Tasman</td>
<td>• Think, Shrink and Grow&lt;br&gt;• Set your goals, make a budget&lt;br&gt;• Managing debt&lt;br&gt;• Saving and investing</td>
<td>Name: Marina Gosnell&lt;br&gt;City: Nelson&lt;br&gt;Tel: (03) 546 9021&lt;br&gt;Email: <a href="mailto:marina@nelsonbudget.co.nz">marina@nelsonbudget.co.nz</a>&lt;br&gt;Website: <a href="http://www.nelsonbudget.co.nz">www.nelsonbudget.co.nz</a></td>
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<tr>
<td>Jac Lockington</td>
<td>Financial Advisor, Educator, Facilitator</td>
<td>Jac Lockington</td>
<td>Blenheim, Kaikoura, Picton, Seddon</td>
<td>• Saving and Investing</td>
<td>Name: Jac Lockington</td>
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<td>• Getting ahead</td>
<td>City: Blenheim</td>
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<td>• Setting goals, making a budget</td>
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<td>• Tackling debt</td>
<td>Email: <a href="mailto:jaclockington@gmail.com">jaclockington@gmail.com</a></td>
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<td>• Retirement planning</td>
<td>Website: <a href="http://www.moneycoaching.nz">www.moneycoaching.nz</a></td>
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<td>• KiwiSaver</td>
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<td>• Financing a home</td>
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<tr>
<td>Buller Rural Education Activities Programme (REAP) Inc.</td>
<td>Educator</td>
<td>Rachel Hill</td>
<td>West Coast including Karamea, Granity, Westport, Reefton, Maruia, St Arnaud and Murchison</td>
<td>• Think, Shrink and Grow</td>
<td>Name: Deirdre McGrath</td>
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<td>Email: <a href="mailto:manager@bullerreap.co.nz">manager@bullerreap.co.nz</a></td>
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<td>Website: <a href="http://www.bullerreap.co.nz">www.bullerreap.co.nz</a></td>
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<td>Unicia Veer</td>
<td>Chartered Accountant, Budget Advisor &amp; Educator</td>
<td>Unicia Veer</td>
<td>Christchurch and surrounding areas, including Rangiora, Rolleston, Darfield and Kaipoi</td>
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<td>• Set your goals, make a budget</td>
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<td>• Managing debt</td>
<td>Email: <a href="mailto:unicia.veer@googlemail.com">unicia.veer@googlemail.com</a></td>
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| Hayden Gardner     | Authorised Financial Advisor  | Hayden Gardner | Christchurch and surrounding areas        | • 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        | Facility                      | Chris Jones  | Christchurch, Canterbury, Culverden, Hanmer, Maruia, Murchison, Reefton. | • 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                               | • 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                                                                 |
<table>
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</thead>
</table>
| Mylrea Bell  | Mylrea Bell | Central Otago, Queenstown Lakes, South Westland, South Canterbury | • Budgeting  
• Managing Debt  
• Savings  
• Set Your Goals  
• Kiwi Saver  
• Insurance  
• Investment  
• Retirement Planning | 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 | • 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 | • 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 |