

Media release 20 May 2013

IFA ANNOUNCES NEW DIRECTORS

The Institute of Financial Advisers (IFA) announced two new board directors elected by the IFA Council today.

John Broad and David McBrearty were elected as directors of the Board and will take up their positions on 1 July 2013.

President Nigel Tate said that IFA is fortunate to have both Mr Broad of Auckland and Mr McBrearty of Christchurch as members of the Board. They are both experienced practitioners and have a good understanding of the needs of IFA members and the role that the professional body plays in leading professional standards for financial advisers.

Mr Broad and Mr McBrearty vacancies left by the two retiring practitioner directors Tony Vidler and Neville Caird.



John Broad CFP^{CM} CLU

John Broad is an Investment and Insurance Adviser for AdviceFirst based in Auckland. He joined the financial services industry in 1990 and his area of expertise encompasses comprehensive financial planning including risk management, insurance and investment. John is an Authorised Financial Adviser, Certified Financial Planner and Chartered Life Underwriter. He holds a Graduate Diploma in Business Studies from Massey University and the NZQA National Certificate in Financial Services (Financial Advice). John has held a variety of positions within the financial services industry including Adviser, Regional Sales Manager and General Manager.

John is an active branch member and is currently serving his third term on the Auckland Branch committee. John has just completed mentoring an Auckland member.

John says he is “at a point in his career where he would like to contribute to a profession that has been hugely influential in his personal and professional development”.



David McBrearty CFP^{CM}

David McBrearty is a Principal of New Zealand Financial Planning based in their Christchurch office. David has been practising comprehensive financial planning for 25 years and has been a Certified Financial Planner since CFP^{CM} was introduced into New Zealand. David has a Master of Commerce in Accountancy from the University of Canterbury and prior to financial planning he worked as the Manager of a fourteen partner legal practice and as Company Secretary for a publicly listed company.

Over his financial planning career, David has been an active branch member and is currently on the Canterbury branch committee.

David says he has now “reached the stage in his career where he is ready to put time and energy into his professional association as it tackles the many challenges that lie ahead for its members”.



Julie Berry CFP^{CM} re-appointed as independent director

Julie Berry was also re-appointed as an independent director of IFA for a second two-year term. IFA President Nigel Tate said the Board agreed unanimously to recommend to Council that Ms Berry be re-appointed as an independent director. “Julie brings a wealth of experience to IFA both as a financial planner running her own business in Australia and from her involvement with the Australian association.” Ms Berry is a Certified Financial Planner^{CM} and former Chair of the Financial Planning Association (FPA) Australia.

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