



FINANCIAL PLANNING
ASSOCIATION *of* AUSTRALIA

MEDIA RELEASE

FPA Awards shortlist reveals outstanding talent

Sydney, 8 November 2016

The Financial Planning Association of Australia (FPA) has announced the shortlist for all six categories of the 2016 FPA Awards. The awards celebrate individuals and businesses who demonstrate commitment to delivering excellent outcomes for clients, and those who have made a notable contribution to their local community. The awards also recognise academic excellence amongst budding financial planners around the country.

FPA CEO Dante De Gori CFP® said the finalists for this year's awards had been chosen from an outstanding pool of talent.

"The calibre of applications for this year's awards impressed everyone on the judging panel, with some judges stating that this was the highest standard we have ever seen. I personally had the privilege of judging the paraplanner category and university student category and it will be an honour to announce our winners at Congress later this month," said Mr De Gori.

The FPA also announced the shortlist for the first ever FPA Professional Practice of the Year, which recognises financial planning excellence at a business level.

Mr De Gori said, "This year we are working with Business Health to consider data gained through our program's complimentary 'HealthCheck' to support the judging of the FPA Professional Practice of the Year. This judging process will also benefit practice owners by providing invaluable information on the health of their business. Again, the calibre has been outstanding."

Commenting on the shortlist for the Future2 Community Service Award, Mr De Gori highlighted the vital work that members carry out within their local communities.

"It is heartwarming to see the ongoing contribution members make to not-for-profits, alongside the good work they do daily for clients. As always, the applications reinforced the great work many members do in giving back to those less fortunate, through the Future2 Foundation, as well as many other organisations across the country," said Mr De Gori.

Depending on the category, award winners will receive access to consumer media opportunities, financial contribution to professional development and complimentary registration to the FPA Professionals Congress. The FPA Professional Practice of the Year will also benefit from a \$10,000 business consultancy package donated by Business Health.

The winners will be announced at the FPA Professionals Congress in Perth on 23 and 24 November, along with the latest winner of the bi-annual Gwen Fletcher Memorial Award. For more information about the FPA Professionals Congress visit www.fpacongress.com.au.

The shortlist for each award is as follows:

FPA CERTIFIED FINANCIAL PLANNER® Professional of the Year Award

William Johns CFP® - Health & Finance Integrated

Tony Sandercock CFP® - wetalkmoney

David Sharpe CFP® - Globe Financial Planning

FPA Financial Planner AFP® of the Year Award

Cody Harmon AFP® – Meridian Wealth Management

Tim McLaughlan AFP® – Elston Private Wealth

Paul Turner AFP® – Wealthwise

FPA Paraplanner of the Year Award

Cynthia Sercombe - Tupicoffs

Shayne Sommer CFP® - Shadforth Financial Group

Future2 Community Service Award

Kathy Havers CFP® – Catalyst Financial Group

William Johns CFP® - Health & Finance Integrated

FPA Professional Practice of the Year Award

Capital Partners - West Perth (WA)

Enlightened Financial Solutions - Mackay (QLD)

ipac West Australia - Subiaco (WA)

FPA University Student of the Year Award

Hilary Acheson - University of New England

Bradley Aleckson - Griffith University

James Van Zyl-Cunningham - Griffith University

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About the FPA

The Financial Planning Association of Australia (FPA) represents the interests of the public and Australia's professional community of financial planners. The Association is unrivalled in its reach of the financial planning market, influence on government and regulators, standards set through a world-class Code of Professional Practice, unique position as the certification body in Australia for the global CFP[®] designation, and reputation for quality professional development. With a growing membership of more than 12,000 members and affiliates, the FPA is home to Australia's 5,500 CFP[®] professionals. Building on a 20-year legacy, the FPA represents the changing face of financial planning from industry to a profession. For more information, visit www.fpa.com.au

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