

## Finsia in New Zealand



Finsia is delighted to be expanding its New Zealand presence. A new Regional Office has been established in the Auckland CBD, which joins the existing Wellington Office in servicing our New Zealand membership.

A major priority is to align Finsia's programs with the New Zealand National Qualifications Framework and register the new organisation as a training provider. We will tailor programs for the New Zealand environment in order to position ourselves as the industry's partner in financial services reform.

Newly appointed New Zealand Regional Manager Ray Woodill joins Finsia with a solid background in financial services. Ray has held management roles with the Bank of New Zealand, Trust Bank New Zealand, Westpac and HSBC.

After a long career with Finsia in Australia, Lee Ushakoff returns to New Zealand as the new Education Manager.

Kevin Bracken, who is well known through his previous role with the AIBF, will continue providing member support and arranging professional development events as Executive Officer, Southern Region (including South Island based in Wellington).

Rob Carthew leaves Finsia at the end of June after six years as our Regional Executive in Auckland. He will be concentrating on his strategic banking consultancy in developing nations. Rob's experience, wide network and wise counsel will be missed.

The New Zealand Regional Council is currently being appointed under the chair of Finsia board member, Richard Dean SF Fin. The council will contribute to Finsia's strategic direction and actively consult with the New

Zealand government and its agencies in relation to legislation and compliance impacting the financial services industry. Also, existing regional Committees will be extended in order to further drive local member initiatives.

As we continue to expand our presence in New Zealand, Finsia wishes to expand our pool of expertise from which to draw lecturers, workshop presenters, assessment markers and practitioners among other roles. Any members or colleagues interested in contributing are encouraged to contact Ray Woodill on (+64 9) 363 3344 or at [r.woodill@finsia.ac.nz](mailto:r.woodill@finsia.ac.nz).

Our future success will depend on strong contributions from our members and industry practitioners. Join the new regional team in their commitment to raising industry standards and providing practical, innovative education, together with relevant industry events and networking opportunities.

Visit [www.finsia.edu.au/education/Finsia\\_Practitioners](http://www.finsia.edu.au/education/Finsia_Practitioners) for further information and help us establish Finsia as the leading professional body representing individuals in the New Zealand financial services industry. Office addresses and contact details for the Auckland and Wellington offices can be found on the Finsia Contact Us web page.

## Merger process complete



With members overwhelmingly accepting the new Constitution and corporate name of Financial

## Archived articles

### ONLINE

JASSA articles are available to members online.

Search the online archives back to 1998. Full text of articles is available back to mid-1999. Find JASSA online index at: [www.finsia.edu.au/members/members\\_JASSA\\_Online.asp](http://www.finsia.edu.au/members/members_JASSA_Online.asp).

### IN PRINT

JASSA authors may order reprints of their articles published in JASSA. For details of costs and quantities contact the publisher, Hardie Grant Magazines, 85 High St Prahran, Victoria, 3181 or phone: (03) 8520 6444 or fax: (03) 8520 6422.

## Contribute to JASSA

According to the 2004 JASSA readership survey, the 10 most popular topics of interest across all respondents are as follows:

- investment strategies (95%)
- securities analysis and markets (92%)
- risk management (90%)
- portfolio management (89%)
- corporate finance (87%)
- accounting, tax and legal issues (86%)
- financial advising issues (85%)
- superannuation (83%)

- valuation (83%) and
- derivatives (75%).

Contact Rosemary McLauchlan on (+61 2) 8248 7617 or via email [JASSAcontent@finsia.edu.au](mailto:JASSAcontent@finsia.edu.au) to discuss your ideas for feature articles.

Visit Finsia's website at [www.finsia.edu.au/members](http://www.finsia.edu.au/members) to download the current JASSA Author Guidelines from JASSA Online page.

Services Institute of Australasia at the AGM in April, the merger process is now complete.

As a result of the AGM, Finsia also has a new president, vice-president and new board members. Michael Shepherd *SF Fin* is the new President for 2006/07 and Chris van Aanholt *SF Fin* is Vice President for 2006/07. The board members for 2006/07 are as follows:

- Michael Shepherd *SF Fin* (President)
- Chris van Aanholt *SF Fin* (Vice President)
- Deborah Batten *SF Fin* – Victoria
- Marianne Birch *SF Fin* – NSW
- Richard Dean *SF Fin* – New Zealand
- John Keeves *SF Fin* – SA
- Malcolm McComas *SF Fin* – NSW
- Julian Pearce *SF Fin* – Qld
- Colin Pitt *SF Fin* – NSW
- Eva Skira *SF Fin* – WA
- Loretta Venten *SF Fin* – Victoria
- Brian Salter *F Fin* (Managing Director and CEO).

We owe a great debt to the time and dedication to the merger process from the retiring Joint Presidents, Mike Pratt *SF Fin* and Fred Grimwade *SF Fin*, and the retiring members of the Interim Board:

- Ian Neal *SF Fin*
- Terry Mason *SF Fin*
- Renée Roberts *SF Fin*.

Finsia can now build on its position as the leading educator and membership body for the financial services industry. The strength of our combined global membership and commitment to the pursuit of excellence within the industry enables us to provide professionals with the most up-to-date, responsive and practical education and professional development available. The recent appointments of a New Zealand Regional Manager and Education Manager will facilitate further significant expansion by Finsia in that region.

## WA Citizen of the Year

On 2 June, John Poynton *SF Fin* was named in the Western Australian Citizen of the Year Awards, among eight Western Australians rewarded for their contribution in various areas of the community. John was honoured for his contribution to business, industry and commerce.

John is an industry figurehead within WA and nationally. He was elevated to Fellow of the SIA in 1999, and to Senior Fellow with the merger last October. He has been a role model within the industry for some decades, and Finsia honours his past membership of WA Regional Council and his current membership of our Ethics Advisory Committee.

# F&I Week ad