



AUCKLAND
TAURANGA
WELLINGTON
NTH ISLAND
CHRISTCHURCH
STH ISLAND/OTHER

OUR \$orted
FACILITATORS



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.

Find a Sorted Seminar Facilitator

Our Sorted Seminar Facilitators are based up and down the country, find you region or location using this guide.

| Region | Page |
|--------------------------|------|
| Nationwide | 4 |
| Auckland | 6 |
| Tauranga | 12 |
| Wellington | 15 |
| Other North Island | 17 |
| Other South Island | 22 |

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.

Nationwide

Sorted Seminar Facilitators who are able to travel throughout New Zealand.

Organisation: Truly Independent Financial Advice
NZ Ltd

Organisation type: Financial Advisor

Facilitators available: Austin Fisher



Area(s) serviced: Nationwide

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Austin Fisher
Auckland
(09) 473 3384
022 109 2240
austinfisher@extra.co.nz
www.tifanz.co.nz

Organisation: Jigsaw Financial Solutions

Organisation type: Financial Advisor

Facilitators available: Sharon Giblett



Area(s) serviced: Nationwide

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Sharon Giblett
Tauranga, Wellington, Lower Hut
0800 JIGSAW
021 566 869
Sharon.giblett@jigsawsolutions.biz
www.jigsawsolutions.biz

Nationwide continued

Organisation: **Stapleton Financial Solutions**

Organisation type: Financial Advisor

Facilitators available: John Stapleton

Area(s) serviced: Nationwide

Sorted Seminars offered: Getting Ahead
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: John Stapleton
Wellington
(04) 977 3877
022 358 8962
istapleton6@gmail.com



Organisation: **ANZ**

Organisation type: Financial Services Provider

Facilitators available: Trisha Edmonds
Mary Potter

Area(s) serviced: Nationwide

Sorted Seminars offered: Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Trisha Edmonds
Christchurch
(03) 368 2526
021 343 171
trisha.edmonds@anz.com
www.anz.co.nz



Auckland

Sorted Seminar Facilitators who are based in the Auckland region.

Organisation: **Desiree Gelbart**

Organisation type: Educator

Facilitators available: Desiree Gelbart

Area(s) serviced: Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing

Contact Details: Desiree Gelbart
Auckland
027 411 025
desiree.gelbart@gmail.com



Organisation: **Joanna Hayman**

Organisation type: Educator

Facilitators available: Joanna Hayman

Area(s) serviced: Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing

Contact Details: Joanna Hayman
Auckland
027 6782326
joannahayman@extra.co.nz



Auckland continued

Organisation: **Simply Budget**

Organisation type: Educator, Financial Mentor
(Budget Advisor)

Facilitators available: Christine Liggins

Area(s) serviced: Greater Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Christine Liggins
Auckland
(09) 425 9500
info@simplybudget.co.nz
www.simplybudget.co.nz



Organisation: **Joseph Liava'a**

Organisation type: Facilitator

Facilitators available: Joseph Liava'a

Area(s) serviced: Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning


Contact Details: Joseph Liava'a
Auckland
027 633 0017
Joseph.liavaa@gmail.com



Auckland continued

Organisation: **Knowledge Base Central**

Organisation type: Educator

Facilitators available: Rosa Chow 


Area(s) serviced: Greater Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Rosa Chow
Auckland
www.knowledgebasecentral.co.nz

Organisation: **Hazel Balderston**

Organisation type: Facilitator

Facilitators available: Hazel Balderston 

Area(s) serviced: Auckland

Sorted Seminars offered: Getting Ahead
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Hazel Balderston
Auckland
022 680 5663
hazelbalderston@gmail.com

Auckland continued

Organisation: **Ochre Business Solutions**

Organisation type: Educator

Facilitators available: Leisa Nathan
John Donaldson

Area(s) serviced: Greater Auckland
Waikato
Bay of Plenty

Sorted Seminars offered: Getting Ahead
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Leisa Nathan
Auckland
(09) 360 1993
021 352 325
leisa@ochrebusiness.com
www.ochrebusiness.com



Organisation: **Franklin Family Support Trust**

Organisation type: Financial Mentor (Budget Advisor)

Facilitators available: Olive Matheson-Croudis
Vicky Mee

Area(s) serviced: Franklin
Pukekohe
Waiuku
Tuakau
Northern Waikato

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Wendy Gillespie
Franklin, Auckland
(09) 238 6233
021 417 010
generalmanager@familysupport.org.nz
www.familysupport.org.nz



Auckland continued

Organisation: **Solutions in Action**

Organisation type: Facilitator

Facilitators available: Debra Knox

Area(s) serviced: Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Debra Knox
Auckland
0 27 280 6503
debra@solutionsinaction.co.nz



Organisation: **George Vea**

Organisation type: Facilitator

Facilitators available: George Vea

Area(s) serviced: Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning


Contact Details: George Vea
Auckland
021 755 208
georgevea@icloud.com



Auckland continued

Organisation: **The Training Company**

Organisation type: Educator

Facilitators available: Robyn Forryan 


Area(s) serviced: Auckland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Retirement Planning

Contact Details: Robyn Forryan
Milford, Auckland
(09) 486 6255
ref@xtra.co.nz

Organisation: **Truly Independent Financial Advice NZ Ltd**

Organisation type: Financial Advisor

Facilitators available: Austin Fisher 

Area(s) serviced: Nationwide

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Austin Fisher
Auckland
(09) 473 3384
022 109 2240
austinfisher@xtra.co.nz
www.tifanz.co.nz

Tauranga

Sorted Seminar Facilitators who are able to travel throughout Tauranga.

Organisation: **HighPoint Academy**

Organisation type: Educator

Facilitators available: Stephen Parr
Peggy MacKenzie

Area(s) serviced: Bay of Plenty
Waikato
Central North Island

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Stephen Parr
Tauranga
(07) 578 5975
027 433 8834
stephen@highpointacademy.co.nz
www.highpointacademy.co.nz



Organisation: **Sylvia Bowden**

Organisation type: Educator, Facilitator

Facilitators available: Sylvia Bowden

Area(s) serviced: Bay of Plenty

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Sylvia Bowden
Tauranga
027 631 8524
sylvia@silbo.co.nz
www.moneycoaching.co.nz



Tauranga continued

Organisation: **Tauranga Budget Advisory Service**

Organisation type: Financial Mentor
(Budget Advisor)



Facilitators available: Diane Bruin
Debbie Green
Jeannine Dunn

Area(s) serviced: Bay of Plenty
including Whakatane
and Rotorua

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Diane Bruin
Tauranga
(07) 578 0969
027 294 4580
info@tgabudget.org.nz

Organisation: **Jigsaw Financial Solutions**

Organisation type: Financial Advisor

Facilitators available: Sharon Giblett



Area(s) serviced: Nationwide

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Sharon Giblett
Tauranga, Wellington, Lower Hut
0800 JIGSAW
021 566 869
Sharon.giblett@jigsawsolutions.biz
www.jigsawsolutions.biz

Tauranga continued

Organisation: Ochre Business Solutions

Organisation type: Educator

Facilitators available: Leisa Nathan
John Donaldson



Area(s) serviced: Greater Auckland
Waikato
Bay of Plenty



Sorted Seminars offered: Getting Ahead
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Leisa Nathan
Auckland
(09) 360 1993
021 352 325
leisa@ochrebusiness.com
www.ochrebusiness.com

Wellington

Sorted Seminar Facilitators who are able to travel throughout Wellington.

Organisation: **Moneymax**

Organisation type: Financial Advisor

Facilitators available: Liz Koh

Area(s) serviced: Wellington to Palmerston North and Wanganui

Sorted Seminars offered: Getting Ahead
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Liz Koh
Paraparaumu, Wellington
0800 273 847
021 313 339
liz.koh@moneymax.co.nz
www.moneymax.co.nz



Organisation: **Sally Killick**

Organisation type: Financial Advisor

Facilitators available: Sally Killick

Area(s) serviced: Wellington

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Sally Killick
Wellington
(04) 918 4621
sally.killick@foxplan.nz



Wellington continued

Organisation: **Stapleton Financial Solutions**

Organisation type: Financial Advisor

Facilitators available: John Stapleton

Area(s) serviced: Nationwide
Wellington



Sorted Seminars offered: Getting Ahead
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: John Stapleton
Wellington
(04) 977 3877
022 358 8962
istapleton6@gmail.com

Organisation: **Innovation New Zealand**

Organisation type: Facilitator

Facilitators available: Mary Lewis

Area(s) serviced: Wellington



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Mary Lewis
Wellington
027 230 1615
mary.lewis@xtra.co.nz

Other North Island

Sorted Seminar Facilitators who are based in other locations in the North Island not listed in the contents table.

Organisation: **Leonie Adams**

Organisation type: Educator, Facilitator

Facilitators available: Leonie Adams

Area(s) serviced: Kaitaia
Far North



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Leonie Adams
Kaitaia
021 162 4004
leonieadams@xtra.co.nz

Organisation: **Just Effective Training (JET)**

Organisation type: Educator, Facilitator

Facilitators available: Valerie West

Area(s) serviced: Northlands



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Valerie West
Awanui
0212 346 782
valerie.west@xtra.co.nz

Other North Island continued

Organisation: Jane Crosbie

Organisation type: Facilitator

Facilitators available: Jane Crosbie

Area(s) serviced: Waikato

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Jane Crosbie
Waikato
021 528 555
janecrosbieartist@gmail.com



Organisation: Cultivate Tribe/TWR Coaching

Organisation type: Educator, Facilitator

Facilitators available: Natasha Willison-Reardon

Area(s) serviced: Waikato
Hamilton

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Natasha Willison-Reardon
Hamilton
0210 2914 094
cultivatetribe@gmail.com



Other North Island continued

Organisation: Raylee Price

Organisation type: Facilitator

Facilitators available: Raylee Price

Area(s) serviced: Waikato
Hamilton

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Raylee Price
Te Awamutu
027 245 5475
kune_rd@xtra.co.nz



Organisation: HighPoint Academy

Organisation type: Educator

Facilitators available: Stephen Parr
Peggy MacKenzie

Area(s) serviced: Bay of Plenty
Waikato
Central North Island

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Stephen Parr
Tauranga
(07) 578 5975
027 433 8834
stephen@highpointacademy.co.nz
www.highpointacademy.co.nz



Other North Island continued

Organisation: **Ingrid Derbyshire**

Organisation type: Facilitator

Facilitators available: Ingrid Derbyshire

Area(s) serviced: Gisborne

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Ingrid Derbyshire
Gisborne
027 656 7878
pderbyshire@ihug.co.nz



Organisation: **Lara Meyer**

Organisation type: Educator, Facilitator

Facilitators available: Lara Meyer

Area(s) serviced: Gisborne

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Lara Meyer
Gisborne
021 104 1579
Lara.meyer@ebo.net.au



Other North Island continued

Organisation: **Fionna Farquhar**

Organisation type: Facilitator

Facilitators available: Fionna Farquhar

Area(s) serviced: Palmerston North

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Fionna Farquhar
Palmerston North
021 0241 9094
fionnafarquhar@xtra.co.nz



Organisation: **Training Ventures Limited**

Organisation type: Educator

Facilitators available: Jeanette Hall

Area(s) serviced: Wairarapa
Eketahuna
Masterton
Carterton
Greytown
Martinborough
Featherston

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Jeanette Hall
Masterton
(06) 377 3378
jeanette@xtra.co.nz
www.trainingventures.co.nz



South Island

Sorted Seminar Facilitators who are based in the South Island.

Organisation: **Nelson Budget Service**

Organisation type: Financial Mentor (Budget Advisor)

Facilitators available: Marina Gosnell
Lisa Dyer

Area(s) serviced: Nelson
Tasman

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing

Contact Details: Marina Gosnell
Nelson
(03) 546 9021
marina@nelsonbudget.co.nz
www.nelsonbudget.co.nz



Organisation: **Jac Lockington**

Organisation type: Financial Advisor, Educator, Facilitator

Facilitators available: Jac Lockington

Area(s) serviced: Blenheim
Kaikoura
Picton
Seddon

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Jac Lockington
Blenheim
027 249 7917
jaclockington@gmail.com
www.moneycoaching.nz



South Island continued

Organisation: Billi Richmond

Organisation type: Facilitator

Facilitators available: Billi Richmond

Area(s) serviced: Marlborough Region
Blenheim
Havelock
Picton



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Billi Richmond
Blenheim
021 424 554
billi.richmond@gmail.com

Organisation: Buller Rural Education Activities Programme (REAP) Inc.

Organisation type: Educator

Facilitators available: Rachel Hill

Area(s) serviced: West Coast
Karamea, Granity
Westport, Reefton
Maruia, St Arnaud
Murchison



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Rachel Hill
Westport
(03) 789 7659
021 078 8512
rachael@bullaerreap.co.nz
www.bullaerreap.co.nz

South Island continued

Organisation: **WestREAP**

Organisation type: Educator

Facilitators available: Cheryl Smeaton

Area(s) serviced: Greymouth
Hokitika
South Westland



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Cheryl Smeaton
Hokitika
(03) 755 8700
027 466 7290
ace@westreap.org.nz
www.westreap.org.nz

Organisation: **Hayden Gardner**

Organisation type: Financial Advisor

Facilitators available: Hayden Gardner

Area(s) serviced: Christchurch
Surrounding areas



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Hayden Gardner
Christchurch
0274 476 717
hayden@nzprivatewealth.co.nz

South Island continued

Organisation: **Unicia Veer**

Organisation type: Chartered Accountant, Educator, Facilitator, Financial Mentor

Facilitators available: Unicia Veer

Area(s) serviced: Christchurch
Surrounding areas



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home
Show me the Money
Fighting Fit

Contact Details: Unicia Veer
Christchurch
021 025 44735
unicia.veer@gmail.com

Organisation: **Chris Jones**

Organisation type: Facilitator

Facilitators available: Chris Jones

Area(s) serviced: Christchurch
Canterbury, Culverden
Hanmer, Maruia
Murchison, Reefton



Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Chris Jones
Christchurch
0800 456 637 (0800 4 JONESY)
chris@swis.co.nz

South Island continued

Organisation: Mylrea Bell

Organisation type: Facilitator

Facilitators available: Mylrea Bell

Area(s) serviced: Central Otago
Queenstown Lakes
South Westland
South Canterbury

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Mylrea Bell
Wanaka
027 443 9942
myl@xtra.co.nz



Organisation: School of Thought

Organisation type: Educator, Facilitator

Facilitators available: Peter Waaka

Area(s) serviced: Central Otago
Queenstown Lakes District
Southland

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Peter Waaka
Queenstown
021 949 915
peterwaaka@xtra.co.nz



South Island continued

Organisation: **Mark Smith**

Organisation type: Facilitator

Facilitators available: Mark Smith

Area(s) serviced: North Otago

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning

Contact Details: Mark Smith
Oamaru
027 678 2571
markofsmith@gmail.com



Organisation: **Jubilee Budget Advisory Service Limited**

Organisation type: Educator, Financial Mentor
(Budget Advisor)

Facilitators available: Sharon Soper

Area(s) serviced: Invercargill
surrounding areas

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Sharon Soper
Invercargill
(03) 214 0942
sharon@jubileebudget.co.nz



South Island continued

Organisation: **Darlene Coomer**

Organisation type: Educator, Facilitator

Facilitators available: Darlene Coomer



Area(s) serviced: Invercargill
surrounding areas

Sorted Seminars offered: Getting Ahead
Set Your Goals, Make a Budget
Tackling Debt
Saving and Investing
Dialling up KiwiSaver
Retirement Planning
Financing a Home

Contact Details: Darlene Coomer
Invercargill
021 560 490
darlenecoomer@gmail.com