



## **AFA Adviser of the Year Finalists 2007**





## **ADAM SMITH**

- Almost 20 years industry experience i.e. commenced with AMP in 1987 (see AFA article)
- Dip FP, CFP
- Members of both FPA & AFA
- Awarded AXA Discovery 2006 Joint Adviser of year
- Married, with 3 kids: 6, 4 & 18 months
- Love sport, in particular: Rugby, AFL & Cricket



## **PAUL DAILY**

Paul is one of the Principals of a business specialising in the provision of solution driven comprehensive Financial Planning advice which encompasses the client's total position, structure, needs and objectives. Paul's business is systems and process driven, producing quality compliant advice and profitability. Paul's business operates with himself, two staff and his business partner John Lindsay who has recently joined the business after a number of years as Head of Distribution of Professional Investment Services.

Paul acts for clients at all stages of life, in both the private and public sectors across a diverse range of industries and professions including IT, Farming and Agricultural, Trades, Construction, Real Estate, Developers, Tourism, Transport, Franchisees, Education, Health Care, Corporate Management, Accountants and Lawyers.

Paul has worked in the financial services industry since 1983. He has completed the Diploma and Advanced Diploma of Financial Services (Financial Planning), a Diploma of Financial Services (Finance/Mortgage Broking Management) and is currently completing a Masters Degree (Financial Planning). Paul is an Authorised Representative of Professional Investment Services Pty Ltd.

He is an Ordinary Member of the Association of Financial Planners, Associate (practitioner member) of the Financial Planning Association of Australia and Accredited member of the Professional Lenders Association Network of Australia. In addition, Paul holds full MIAA Membership as an (Independent Operator) with Accredited Mortgage Consultant Recognition status and is a member of the Credit Ombudsman Service Ltd.



## **PHILLIP YOUNG**

Phillip is CEO/Director of Australian Financial Risk Management Pty Limited (AFRM) a Financial Services Licence Holder that concentrates on Risk Management Analysis for clients of Accounting and Financial Planning Practices in NSW. AFRM has offices in Sydney, Central Coast, Newcastle and Port Macquarie.

Phillip joined the Financial Services Industry in September 1989, returning to work in the family owned general insurance business after working for a multinational English Company.

He has been responsible for implementing the commercial joint ventures with Accounting and Financial Planning Practices since 1993, and designed with other staff, the compliant systems and advice processes leading to detailed Statements of Advice for their accountant/business partner's clients.

Holds Diploma of Financial Services (Financial Planning). In 1990 underwent Life Insurance training with AMP and the Australian Life writer's Association.

In his past life Phillip completed a cadetship in journalism after leaving school, attended studies in Law at Sydney University and Financial Accounting & Management at University of NSW School of Management.

He is married to Christine, lives in Merewether (a beachside suburb of Newcastle NSW) and together they are still feeding, clothing and educating the 4 remaining children living at home. His working week consists of working in the Newcastle office on Mondays and Tuesdays, and then working in the Sydney office Wednesday to Friday.



## **BEVERLEY CARLYON**

Beverley Carlyon has worked in the financial planning industry for over 20 years. She commenced in 1984 working for Westpac Banking Corporation as a marketing officer. She was seconded to Westpac Life in 1987 as an insurance and investment adviser.

In 1989 she moved from Westpac to Ansva Life as the NSW State Manager. Ansva Life was sold and in March 1990, Bev's company, **Integrated Professional Services (IPS)** commenced business as a multi agency.

IPS has been in operation for over 17 years, in September 2001 the firm changed to the Brokerage and Dealer Group Structure with Genesys Wealth Advisers.

Bev is now the only Principal of Integrated Professional Services with a client base of approximately 1,000 clients and also has a second business as financial adviser for Diabetes NSW, Queensland, Victoria, WA, SA and the ACT with over 180,000 members.

An experienced speaker, Bev has presented financial planning seminars both in Australia and overseas. She has been involved in mentoring small business owners through the Business Enterprise Centre in Sydney. She has also been the creator of the MDRT Excelerate Program – a program designed to help new advisers in the industry thrive – not just survive. Bev mentors 50 of these new advisers on a voluntary basis as well as being the Oceania Chair for MDRT.

In past years Bev has held voluntary roles on committees for AFA in Education, Seminar co-ordination and Membership Recruitment, for MDRT as NSW Chair, Australia Chair and currently Oceania Chair. As MDRT Oceania Chair Bev is responsible for the running of FIJI, New Zealand and Australia.

Active in various professional organisations, Bev is a Chartered Financial Practitioner through the Association of Financial Advisers and Top of the Table for the Million Dollar Round Table, she is also a Chartered Financial Adviser through the FPA.

In the Community Bev is actively involved in raising funds for research in the areas of Diabetes and has worked on the fund raising committee for organisations such as The Moira Kelly Children's First Foundation.



## **ROSS VANDERWOLF**

Ross has been an adviser in the Financial Services industry since August 1981. He has served as a member of the Brisbane Branch of the Life Underwriters Association and is now the State Director of the AXA Authorised Representatives Association.

Ross is a Life Member and present and previous Oceania chairman and current Divisional Vice President (Member Communications Committee) of the prestigious MDRT Organisation, a world wide body of insurance and financial planning professionals. He has been a guest speaker at national and international conferences. During Ross' career he has completed numerous insurance and financial planning courses, and is a Certified Financial Planner (CFP) granted through the Financial Planning Association. Ross' specialty is with full financial plan construction incorporating advice on wealth accumulation, superannuation, personal insurance and retiree planning.