

## **Anthony Carl (Tony) Vidler**

### **Financial Services Expert**

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#### *EXECUTIVE SUMMARY:*

With nearly 30 years experience in advising and managing all aspects of financial services distribution in NZ, there is a proven success record of operating and managing in financial advice disciplines.

An experienced financial advice practitioner also with significant management experience in resolving complex business and financial advice challenges, combined with strong governance and commercial experience. Extensive personal sales and marketing skills have been combined with a long-standing involvement in professional development, along with the evolution of best practice processes and compliance standards over many years.

Uniquely characterized as an entrepreneurial strategic thinker with strong personal integrity, with significant respect and trust throughout the financial services industry and high credibility with advisers and other market participants as a leader in the advice field.

Certified Financial Planner  
Chartered Life Underwriter  
Chartered Financial Consultant

Member Institute of Financial Advisers

#### **PARTICULAR FINANCIAL ADVISORY EXPERTISE:**

- Analysis and provision of insurance-based risk management solutions
- Policy Replacement analysis & considerations
- Compliance and regulatory reform implication
- Best practice advisory processes
- Advice documentation
- Professional standards & professional designations
- Advisory skills & sales practices
- Sales distribution strategy

Regular industry presenter and speaker, or authority for industry media, on issues surrounding implementation of evolving best practice standards in the provision of advice. Provide regular articles and newsletters to industry via own company website, blogs in industry media, and fortnightly newsletter to over 10,000 industry members.

Individual testimonials relating to professional expertise can be viewed at <http://www.strictlybiz.co.nz/testimonials/>

## PROFESSIONAL EXPERIENCE HIGHLIGHTS:

- [Financial Standard's Power 50 \(most influential people in financial services social media\)](#)
- [Named in Top 250 Online Financial Services Influencers Globally](#)
- Personal financial adviser in New Zealand since 1990.
- Extensive advisory and practice management experience, with establishment and ongoing management of own independent advisory firm (Moneta Financial Group). This business provided advice in a comprehensive range of financial services areas. Operations included personal risk management, investment advice, comprehensive financial planning, fire & general insurance, premium funding, tax consultancy. Grew to 24 personnel, \$25m FUM, and in excess of \$8m in-force risk API. Sold my share of business in late 2007 to business partner, after nearly 11 years of management.
- A former Director of the Institute of Financial Advisers (IFA) for 8 years, and the immediate past Chairman of the Board for the IFA.
- Have served a full term as Chair of the College of Insurance Advisers for the Institute of Financial Advisers.
- Have served as the Chair of the Professional Development Committee for the Institute of Financial Advisers.
- Have served as a member of the Certification Committee (which approves and/or reviews all professional designation applications) for the Institute of Financial Advisers.
- Co-authored industry practice guidelines paper on "Replacement Insurance Business"
- Catalyst for establishment of FAANZ, the financial adviser associations representative body, and member of initial board. Strongly involved in submission and negotiation process during drafting and consultation phases of the Financial Advisers Act, as an industry expert.
- Following sale of own practice was employed by Fidelity Life Assurance Company Ltd. In that time was the the Professional Development Manager (handling development of internal compliance systems, QFE preparedness and distribution compliance) for Fidelity. Subsequently assumed the role of General Manager Investments for Fidelity Life, which largely involved managing distribution and advice network issues, together with existing investment product management.
- Financial Alert Person Of The Year for NZ financial services 2011

## RELEVANT PROFESSIONAL CREDENTIALS:

Formal technical training courses and professional qualifications:

- FPG Research Financial Planning Fundamentals block course, 1994
- Completed all 4 available Adviserlink technical training courses (4) 1998-2000
- Dip. Bus. (Personal Financial Planning) - Massey University, 1998
- Completed 2 further papers from Diploma Business Studies (Risk Management) through Massey University, in 2001 & 2004 (Business Insurance, and Advanced Issues in Insurance)
- Chartered Financial Consultant (ChFC), completed 1998
- Certified Financial Planner (CFP), completed 2000
- Chartered Life Underwriter (CLU), completed 2005
- Completed Adviserlink Business Risk Management course 2005
- Qualified as a DAO Assessor for Standard Set C, 2010
- Authorised Financial Adviser, beginning 2011. Resigned Authorisation in July 2016.
- Awarded Fellowship of Institute of Financial Advisers, 2011

## CAREER CHRONOLOGY

- Jul 2011 – Present. Self employed consultant, trading under Strictly Business Ltd.
- Jul 2010 – Jul 2011. General Manager Investments, Fidelity Life.  
An Executive Management role focused on sales and marketing of investment business, including product development, distribution management and legacy systems management, member of Investment Management Committee and member of Executive team. Key functions: migration of legacy investment business with high retention; re-structure of agency distribution system into compliant model, re-focus & growth of Kiwisaver business.
- Jul 2009 – Jul 2010. Professional Development Manager, Fidelity Life.  
Senior management role focused on compliance and regulatory reform. Key functions: developing QFE ABS & systems; development of advisor compliance tools & systems; creation of internal compliance structure & systems.
- Dec 2007 – July 2009 Senior Business Development Manager, Fidelity Life.  
Responsible for distribution development and support for areas south of Christchurch.
- Dec 1997 – Dec 2007 Managing Director, Moneta Financial Group.  
Own practice (with business partner), and management of firm from inception. Worked as an adviser also with about 400 clients whilst Managing Director, providing investment, savings and risk advice. The firm managed over 5,000 retail clients, with significant business volumes, and was a very early adopter of best practice processes.
- Jun 1993 – Dec 1997 District Sales Manager, Norwich Union Life Insurance Society.
- Jun 1990 – Jun 1993 Life Agent, Norwich Union Life Insurance Society.
- May 1982 – May 1990 Royal Australian Navy, Communications Branch.