



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

*Financial Services Expert*

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**EXECUTIVE SUMMARY:**

Over 35 years experience in advising and managing all aspects of financial services distribution in NZ, with a proven success record of operating and managing a variety of 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.

Chartered Financial Consultant

Formerly;  
Certified Financial Planner  
Chartered Life Underwriter  
Fellow of Financial Advice New Zealand  
(resigned these in December 2025)

*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 global financial services industry via own company website, blogs in industry media, and fortnightly newsletter to over 23,000 industry members.

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

*Disclosures:*

**Strictly Business Ltd.** Sole director & shareholder of consulting and compliance services provider to the NZ financial services sector.

**AdviceNet Ltd.** Sole director & shareholder of FAP providing advisory services and product distribution arrangements.

**MySolutions Ltd.** Director and 20% shareholder of financial adviser network consisting of >380 members.

### *PROFESSIONAL EXPERIENCE HIGHLIGHTS:*

- Recognised as one of the Top 250 Influencers globally in financial services
- 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, now known as FANZ) for 8 years, and served as Chairman of the Board for the IFA for 2 years.
- Served as Chair of the College of Insurance Advisers for the Institute of Financial Advisers.
- Served as the Chair of the Professional Development Committee for the Institute of Financial Advisers.
- Served as a member of the Certification Committee (which approves and/or reviews all professional designation applications) for the Institute of Financial Advisers.
- Authored industry practice guidelines paper on “Replacement Insurance Business” which became the industry standard
- Heavily involved in submission and negotiation process during drafting and consultation phases of the Financial Advisers Act, as an industry expert and leader of the industry professional body, working closely with the regulators, MBIE and the Minister.
- 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
- Resigned as a CFP & CLU in December 2025.