

VOCATIONAL EDUCATION WORKSHOP FACILITATOR PROFILE

Jamie Kelly Dip FS FPPA MA (Funds Mgmt)

Qualifications/Education

- Masters of Arts (Funds Management) – Macquarie University
- Diploma in Financial Planning – FPA
- Certificate Corporate Governance of ASX Listed Entities Course
- Certificate in Financial Markets - SIA
- Certificate IV in Training and Assessment

Professional affiliations/memberships

- Fellow – Financial Planning Association of Australia (FPA)
- Australian Compliance Institute

Career history

- Jamie is financial services professional with over 30 years of industry experience.
- He worked with CBA for 13 years in various roles and as assistant manager, business development in 1984 Jamie helped establish CBA Financial Services and CommLife.
- From 1988 to 2000 Jamie worked for Mercantile Mutual where he became state business development manager, investment products for NSW & ACT and was directly responsible for the new business growth from \$3.2m (in 1988) to over \$1b.
- In 2000 Jamie moved across to Challenger International as NSW state manager, then regional manager (NSW & QLD), then national sales manager (investment products) and finally manager Challenger Managed Investments Ltd (CMIL) where Jamie was directly responsible for development and implementation of five new manage the manager funds that had already attracted \$267m.
- Currently Jamie works as a consultant for 20 small to medium dealers and fund managers providing consultancy services, responsible manager, serves on independent compliance committees, temporary management, locum financial planning and training services.

Contribution to Kaplan Professional/Integratec/Tribeca

- Jamie has been involved with Kaplan and its predecessor companies in various capacities such as editorial committee and assessment maker since 1993.
- Jamie is currently involved as a senior facilitator and workshop presenter for the DFS and ADFS program and Tier 1 Specialist Knowledge courses.