

# VOCATIONAL EDUCATION WORKSHOP FACILITATOR PROFILE

**Peter Martinovich BEng BBus Grad Dip App Fin & Inv Dip Fin Plan**

## **Qualifications/Education**

- Bachelor of Business (Accounting & Finance) – Edith Cowan University
- Bachelor of Engineering – University of WA
- Graduate Diploma in Applied Finance & Investment – Finsia
- Diploma in Financial Planning – Royal Melbourne Institute of Technology
- Certificate IV in Training and Assessment

## **Career history**

- Peter is financial services professional with over 20 years of industry experience.
- Peter moved into the financial planning industry in 1986 and worked as a financial planner until 1993 when he moved into a technical support, training and compliance role for financial planners with MLC.
- In 1996 Peter went out on his own and embarked on a paraplanning career before opting to concentrate on being a responsible manager for other licensees plus continuing his training of other financial advisers.
- In 2001 Peter then became national manager financial planning, technical services, paraplanning & training with Deakin Financial Planning until 2005.
- Currently Peter continues his responsible manager roles with specialist licensees through providing compliance, training and technical support for advisory groups and advisers, he also has a select group of clients for whom he provides financial planning advice.

## **Contribution to Kaplan Professional/Integratec/Tribeca**

- Peter is currently a senior facilitator for the face to face training workshops for subjects within the Diploma and Advanced Diploma of Financial Services, Tier 1 Specialist Knowledge program and Self-Managed Super Funds.
- Peter has also been called upon to be involved in the editorial task force team for manual reviews of the DFS and ADFS subject materials.