

# VOCATIONAL EDUCATION WORKSHOP FACILITATOR PROFILE

## **Sonia Currey BEc DipFP**

Sonia Currey Consulting

### **Qualifications/Education**

- Cert IV in Workplace Assessment and Training
- Diploma Financial Planning – CFP
- Bachelor of Economics

### **Professional affiliations/memberships**

- Financial Planning Association of Australia (FPA)
- Australian Retirement Income Streams Association (ARISA)
- Investment and Financial Services Association (IFSA)

### **Career history**

- Sonia has over 15 years experience in the financial planning industry.
- Sonia has held positions including a technical research role at RetireInvest where she assisted advisers with superannuation, tax and social security strategies. She later headed the technical team at Tower Life Australia promoting their funds management and life insurance products to research houses and external advisers.
- Sonia then became general manager at Investec overseeing the marketing and technical advice for Investec's funds management and private client advisers.
- Sonia currently works as consultant, facilitator, lecturer and editor/writer in the technical financial planning, financial services space and has had numerous articles published and completed the Asset Management module for the Hong Kong Securities Institute and has also won Best Lecturer, Securities Institute of Australia, 2004.

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

- Sonia has been a contributor to Kaplan Professional (and companies it has acquired) for the past 11 years.
- Sonia's contributions include a senior facilitator and workshop presenter role across subjects in the Diploma of Financial Services (Financial Planning), Advanced Diploma of Financial Services (Financial Planning), Tier 1 Specialist Knowledge courses and the PD Short Course program.
- Sonia has also been heavily involved at Kaplan Professional in the Superannuation and Planning programs as a Task Force member, lecturer, exam & assignment marking.