



NEW ZEALAND FINANCIAL PLANNING

Helping you make smart choices with your money



"Plan for tomorrow, live for today."

Jordi Garcia

ED, BCom, LLB, CFP^{CM}, Director NZFP

Jordi is a founding co-director and principal of NZFP and has over 25 years experience in the financial services industry, with the last 22 in financial planning. His prior experience was in the banking and mortgage broking industries and included establishing tax-oriented structures for investors.

A regular presenter of financial planning, investment and estate planning seminars, he has also tutored and lectured part-time at the University of Auckland for many years.

In 2001, Jordi was awarded the New Zealand Financial Planner of the Year Award sponsored by Good Returns Magazine, for excellence and professionalism within the industry.

Jordi also served for 20 years as a part-time member of the Territorial Force of the NZ Army, finishing in 1999 as the Commanding Officer of the 3rd Auckland (CRO) and Northland Battalion, Royal New Zealand Infantry Regiment as a Lieutenant Colonel. He was awarded the Efficiency Decoration (ED) in 1992.

Outside of work, Jordi was a member of the Henderson Rotary Club until he, his wife and their four teenage children moved to the North Shore. His current interests outside of financial planning revolve around his family, while he also loves to read a good book, kayak and keep fit.

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You may request a full adviser disclosure statement, free of charge, by contacting any one of the above offices.

For more information on our people and services please visit our website

<http://www.invest.co.nz>

