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PlanPlus announces 2016 Global Financial Planning Awards Winners

Toronto, Ontario, CANADA, Aug 10, 2016 – PlanPlus announces the winners of the 2016 Global Financial Planning Awards, with Rose Swanger from Tennessee taking the honors for the Americas region, Ann Marie Regal of Singapore coming out on top for Asia and David Reed from Australia winning for Europe/Australia.

The PlanPlus Global Financial Planning Awards were launched four years ago to recognize the importance of financial planning in our society. Top financial planners from three global regions - the Americas, Asia and Europe/Australia - are recognized. Competing planners must submit a written financial plan that has been developed and presented to an actual client and which clearly shows the delivery of outstanding financial advice focused exclusively on the client's best interests. Finalists give live presentations of their plans to a judging panel of top planning experts from around the world.

"This competition just keeps getting better and better", said Awards Chair, John Page. "This year, in addition to the Global Awards, we held national competitions in Canada, Germany, Singapore and Malaysia, with the top three in each national competition moving on to compete in the Global Awards finals. The improvement in the quality and depth of the plans received is absolutely outstanding, and we were especially thrilled to see a vast improvement in the plans submitted from smaller countries in which financial planning is still in its infancy", said Page.

Rose Swanger, MBA, CFP®, RICP®, of Advise Finance, LLC, in Knoxville, Tennessee, USA was chosen as the Americas Region overall winner. This is a second win for Rose, who first took the top honors in 2014. The Americas Region competition was so close that Canada Awards winner Conrad Toner, B.A., CFP®, CLU, of True North Retirement Counsel in Peterborough, Ontario, and Hyder Hassan, PFP, EPC, of Canadian Western Bank in Calgary, Alberta, were both announced as first runners up.



Americas winner Rose Swanger said "I'm grateful and honored once again to be the first place winner for this year's competition, and I applaud PlanPlus' ongoing efforts to encourage all financial planners to take a holistic approach in managing their clients' finances. Ultimately, it's the harmony of all aspects of a person's financial life which leads to one's success, happiness, and fulfillment".

Ann Marie Regal, CFP® of Globaleye International Wealth Solutions in Singapore is also a second time recipient of this award, having first won for the Asia region in 2015. Roy Varghese, CFP® at iFast Financial, Singapore not only won the PlanPlus Singapore Awards but was also chosen as first runner up for the Global Awards Asia Region.

"It is truly an honor to win the PlanPlus Global Financial Planning Award for the second time", said Asia winner Ann Marie Regal. "I want to thank PlanPlus for giving planners the opportunity to compete globally and challenging us to continually raise our financial planning standards. Winning the award for the second time reinforces my belief that I am providing world class, cross-border, financial planning advice and service to my clients".





David Reed, B.Bus. Adv.Dip.FS. SSA. AFP ®, The Retirement Advice Centre, Australia, is the first place winner for Europe/Australia. Natalia Smirnova, the 2015 Europe/Australia winner was announced as first runner up, with Alexander Gerth, the 2016 Germany national Financial Planning Awards winner placing as second runner up.

David said, "This is a fantastic reward, not only for our team, but also for our clients who have openly shared their personal experiences of retirement with us. We have strived to build a business using feedback on what clients are looking for in the area of retirement planning. To have our value proposition and the advice we dispense benchmarked as being world-class is ultimately a great testament to the power of listening to clients and then sculpting a service offering based on what they tell us!"

Along with the global recognition they receive, Rose, Ann Marie and David are each awarded all expenses-paid trips to attend the 2016 FPA Annual Conference held from September 14th to 16th in Baltimore, Maryland, courtesy of PlanPlus and the Financial Planning Association (USA). Hosted by the FPA, this conference is the largest annual gathering of CFP® professionals, with more than 2,000 financial planners representing dozens of countries from around the world attending.

"When PlanPlus launched the Global Financial Planning Awards in 2013, we wanted to feature real financial planners doing professional, fiduciary level planning for their clients and to show how this can transform their client's lives", said Shawn Brayman President and CEO of PlanPlus Inc. "We had no idea our initiative would take off as it has, with four countries now running national competitions using this framework, which in turn is feeding more high quality planners to the global competition. We have already been asked to work with more countries to launch additional national competitions and I am sure 2017 will be even more exciting", said Brayman.

For more information on the PlanPlus Global Financial Planning Awards visit gfpa.planplus.com

About PlanPlus Inc.

PlanPlus Inc. has been developing financial and investment planning software tools and training for use by financial institutions, professional advisors and the consuming public for the past 25 years. PlanPlus has become a world-recognized firm with its groundbreaking multi-lingual, multi-currency, multi-jurisdiction PlanPlus Plan*it* software and industry-leading training offerings now offered in over 30 countries. For more information, visit: www.planplus.com.

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