



Global Adviser Alpha
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David Haintz

David Haintz is a Certified Financial Planner (CFP) and a past director of the Financial Planning Association of Australia (FPA), in which time he was instrumental in the push for professionalism. He has had a 28 year career with his own firm and subsequently became a founding director of Shadforth Financial Group, with over 100 advisers; which was taken over in 2014 for \$670m - at the time \$13b FUM, \$165m revenue and \$58m EBIT.

David was the sixth adviser in Australia to be awarded a Fellow of the FPA and served on the FPA Disciplinary Committee for seven years, the FPA Professionalism Committee for six years and was a National Judge at the FPA's inaugural Value of Advice Awards. He is a founding trustee of the Future2Foundation, lectured at the FINSIA for six years and has been a member of the international Financial Planning Standards Board - Developing Markets Practice Management Working Group.

He has presented at international conventions such as the UK Institute of Financial Planning and the South African Institute of Financial Planning conferences; in 2017 had consulting engagements in 18 countries including diverse locations such as the UAE, Germany, India and Norway.

David remains the only adviser in Australia to be awarded the two prominent awards - Australian Financial Planner of the Year (2005) and Australian Best Practice of the Year (2004).

In 2017, David launched a book titled *The Life-First Advisor - How the new financial coach connects 'money' with 'meaning'*.

Having departed Shadforth in 2015, he has established Global Adviser Alpha - a B2B consultancy with a passion for helping leading global advice businesses become world class and achieve outstanding result for all stakeholders.

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