

Our Client Promise

Our Clients

Our business is built on helping all New Zealanders to protect what's important to them. Without our clients, we do not have a business. Our clients come first and foremost in all we do.

Our Client Experience

After meeting with us, our clients leave better informed about their risks, the quantification of their risks, and their options. We understand what's important to them and provide suitable recommendations and options to help them make informed decisions.

Trusted Adviser

As Financial Advisers in our business, we have become trusted advisers to our clients. We work together to prepare for and defend against life's challenges, and we are there to support, help, and provide advice along the way.

What to expect from us as your Financial Adviser

We are required to follow our internal policies and procedures, adhere to our Code of Conduct, and provide clients with professional service.

Our Client Care, Diligence, and Skill

When you work with us, you can be confident that we are qualified to provide advice to you and that we complete ongoing professional development to stay current with any changes. We will try to keep our advice free of jargon.

If Things Go Wrong

There may be times when clients are unhappy. We will listen to your concerns and work with you to resolve the situation in a timely manner. If we cannot agree, then we will refer you to our Disputes Resolution Scheme, which will work through the issue impartially.

Our Commitment

We have checks and balances in place to support good conduct in our business, address any poor conduct, and keep our clients as the key focus of our business.

Our Processes

We are supported by tools, policies, procedures, and controls to ensure that not only do we meet our regulatory obligations (and conduct regular compliance checks to make sure this happens) but we deliver the service we promise you.

Our Values

In our business, our values drive our approach to business. It's about staying true to the needs of our clients and their interests.