



**Wealthpoint**

Wealthpoint Overview

Supporting trusted  
financial advice in  
New Zealand for  
over 100 years

[wealthpoint.co.nz](https://wealthpoint.co.nz)

July 2023

Welcome to Wealthpoint

# Unlocking financial success together

Welcome to Wealthpoint, a dynamic cooperative owned by a network of 50 financial services advisory businesses spanning over 70 locations across New Zealand.

With an expert team of over 150 experienced financial advisers specialising in life and health insurance, general insurance, investments, KiwiSaver, and mortgages, Wealthpoint proudly stands as one of the country's largest and most trusted independent financial adviser groups.



## Powered by a Nationwide Network

At Wealthpoint, our financial advisers are more than just experts in their field; they are entrepreneurs who own and operate their own businesses. However, what sets them apart is the way each Member business collaborates and co-operates with each other to form a very powerful national network structure. Drawing upon our rich heritage of supporting advisers since 1921, through both Wealthpoint and our previous adviser association, we have cultivated an ecosystem where our advisers thrive and flourish.

## Enabling Trusted Advice and Solutions



Wealthpoint is dedicated to providing comprehensive business support services to our member businesses, empowering them to deliver advice and product solutions of the highest calibre. As a licensed Financial Advice Provider (FAP), we bear the regulatory responsibility for the advice provided by our Members. This commitment ensures that when you choose Wealthpoint, you can have absolute confidence in the quality and integrity of the guidance you receive.

## Locally Owned, Nationally Connected



Our financial advisers are deeply rooted in their communities, forging meaningful connections and understanding the unique needs of their clients on a personal level. While we boast a national footprint, our advisers live and work in the local communities they serve. This localised approach allows us to provide tailored solutions that align precisely with your individual circumstances and aspirations.

### WEALTHPOINT'S MEMBER BUSINESS LOCATIONS

**NORTH ISLAND:** Auckland, Cambridge, Gisborne, Hamilton, Hastings, Kaitia, Kerikeri, Lower Hutt, Masterton, Matamata, Napier, New Plymouth, Palmerston North, Papamoa, Putaruru, Taihape, Te Awamutu, Te Kuiti, Warkworth, Wellington, Whanganui, Whangarei and Whitianga.  
**SOUTH ISLAND:** Blenheim, Christchurch, Greymouth, Invercargill, Nelson and Timaru.

# How we help our Members

The Wealthpoint team's purpose is to make it easier for our Members to run successful businesses so their advisers can deliver trusted advice to you, their clients. Our national support team, based in Auckland, are highly committed to achieving this. Wealthpoint provides access to a wide range of services, technology systems

and product offerings. What sets us apart from other adviser groups is that our key services are delivered by our own support team, rather than being outsourced to third party providers. This means that we better understand the needs of our financial advisers and the clients they serve.

## Some of our key Member services are:



### Regulatory Compliance Support

You can rest easy knowing that all Wealthpoint advisers follow a meticulous advice process and adhere to a detailed Professional Standards Manual. Our goal is to provide you, your family, or your business with high-quality advice and great outcomes.



### Supplier Access

With distribution agreements established with over 50 leading insurers, fund managers, banks, and other lending institutions, Wealthpoint puts a huge range of leading financial services products and suppliers at your fingertips.



### Business development support

As business owners, Wealthpoint Members receive comprehensive guidance and support to foster growth and prosperity. We offer assistance in recruiting new advisers, provide access to capital for growth initiatives, and equip Members with a suite of tools for optimal business efficiency.



### Quality Assurance Reviews

Our specialist compliance team conducts regular reviews of advice provided by Wealthpoint advisers. This maintains our high standards and ensures tailored client solutions cater to your unique needs and financial situation.



### Preserving Independence

Wealthpoint is fiercely independent. We don't accept sales targets in our commercial arrangements, ensuring you receive unbiased advice that delivers the best possible outcomes to you.



### Professional Development and Training

Wealthpoint's commitment to continuous improvement means our professional development team delivers high quality training to our Members, ensuring their knowledge remains up to date.



### Empowering Technology

Wealthpoint prioritises the security and confidentiality of your personal data with our range of leading technology platforms. In our investment business, these platforms also provide clients with convenient access to view their fund balances for seamless performance tracking.



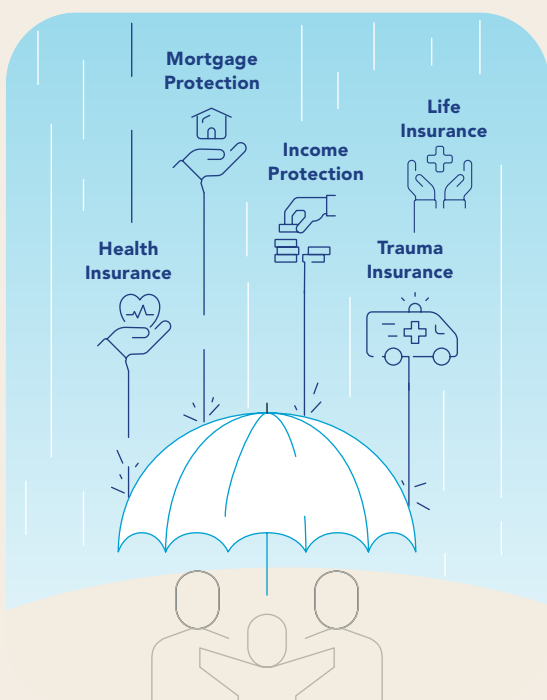
# How our Members can help you

Wealthpoint advisers believe in empowering individuals like you to make informed financial decisions with confidence. Let them guide you through life's most significant milestones, and ensure you have the resources and knowledge to create a secure and prosperous future.

With their expertise across life and health protection, comprehensive general insurance solutions, investment strategies, and tailored mortgage services, they are committed to unlocking your financial potential and helping you achieve lasting success.

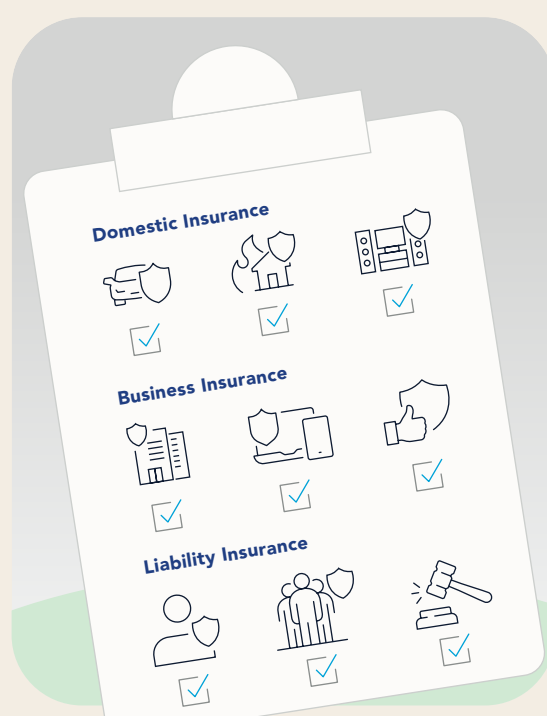
## Life and Health Insurance

When it comes to life's unexpected twists and turns, our financial advisers are here to provide the guidance and support you need. Safeguard yourself and your loved ones from the impact of unforeseen events such as illness, long-term disability, or loss of life. With our expert advice, you can find peace of mind, knowing that your income will be protected and debts will be managed during challenging times.



## General Insurance

Our experts offer a wide range of insurance solutions tailored to your unique requirements and budget. We can help with home, contents or vehicle insurance and also provide access to many business insurance and liability covers. Our advisers have access to an extensive network of trusted insurers, both locally and internationally.

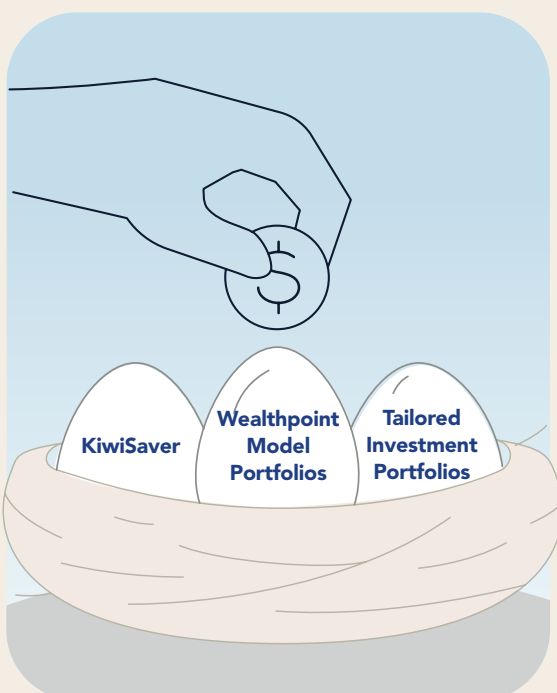




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## Investments

Our investment advisers are well-versed in a broad range of investment vehicles, all aimed at securing your long-term financial stability. With access to top-tier fund managers for KiwiSaver, carefully designed Wealthpoint investment portfolios, or other personalised investment solutions, our advisers will guide you towards maximising your returns and achieving your financial goals.



## Mortgages

No matter where you are on your home ownership journey, Wealthpoint advisers are equipped with an array of mortgage solutions from New Zealand's leading providers. Whether you're a first-time homebuyer, upgrading to your dream property, expanding your investment portfolio, or seeking to optimise your personal debt arrangements, our advisers will expertly navigate the mortgage landscape for you.



# A national footprint with a local focus

Over 175,000 New Zealanders trust Wealthpoint Advisers to help them achieve their financial goals

**\$160<sub>m</sub>**

Life and Health  
Premium

**\$3.6<sub>B</sub>**

Funds Under  
Advice

**\$250<sub>m</sub>**

Annual Mortgage  
Settlements

**\$80<sub>m</sub>**

General Insurance  
Premium

*Figures as at 1 July 2023*

Wealthpoint Limited

308 Parnell Road, Parnell, Auckland 1052

PO Box 37451, Parnell, Auckland 1150

+64 9 972 0470

info@wealthpoint.co.nz

[wealthpoint.co.nz](https://wealthpoint.co.nz)