

# Wealthpoint Town & Country



# Wealthpoint Town & Country



## Who we are.

The Sterling Family has been involved with offering Financial Services to Kiwis since 1966. Since the start we've offered qualified trusted advice that you can depend on.

We work alongside people who value our advice and are wanting long lasting relationships for their insurance needs.

Our commitment is to be here for you, when you need us, year after year.

# Wealthpoint Town & Country



We desire to build and keep trust over a long period of time through the right advice and solutions that do work.

Our business relies on doing the right thing for our clients.

One of our greatest satisfactions is to see the plans and protection we put in place coming through just when it's needed.

Stability, expert advice and tailored solutions is what you can expect.

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## Wealthpoint.

Wealthpoint is a co-operative owned by a network of more than 50 financial services advisory businesses, operating from more than 70 locations across New Zealand

With over 150 financial advisers, Wealthpoint is one of New Zealand's largest independent financial adviser groups.



# Wealthpoint Town & Country



Wealthpoint adviser businesses are local business-owners with the backing of a national engine.

Wealthpoint provides us with the tools & support to meet your unique needs with leading solutions.

Wealthpoint operates as a licensed Financial Adviser Provider (FAP) – a relatively recent regulatory reform.

Our Advisers are engaged directly to Wealthpoint Limited under their FAP.

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## Where we came from.

Wealthpoint was formed out of an adviser association that was first set up in 1921 to provide business support and professional services to AMP “Agents”.

AMP Adviser Businesses then emerged, and the adviser association continued to represent these businesses. During this time, you may have known us as Certus Financial Group.

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In 2020, the Sterling family began our own adviser business under the Wealthpoint network.

The majority of Wealthpoint members share the AMP story. Our relationship with the other Wealthpoint members mirror those that we have with our clients:

A relationship based on trust, integrity and doing the best we can for the long-term financial good.



# Wealthpoint Town & Country



## Town & Country.

Since the beginning as Advisers, we have aligned ourselves in the rural area – we enjoy getting to know our farming clients & being involved in the community.

We also spend a lot of time with our commercial & domestic clients that are based in towns thru-out New Zealand.

As such we felt the name **Town & Country** summed up our diversity with offering insurance solutions.



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## Directors.

**Kim** has been working in the Insurance Industry since 2001. In 2006 she became an Adviser and has a Bachelor of Commerce in Marketing & Human Resources, to go along with her National Certificate in Financial Services.

Kim's areas of focus are life, trauma & income covers along with group & personal health, business protection and travel insurance.

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**Bevan** has been working as an Insurance Adviser since 1996. He specializes in offering General Insurance solutions to Farm, Business & Personal Clients

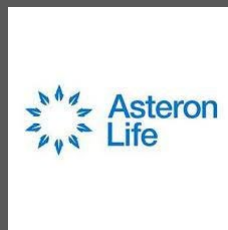
With over 20 years of insurance experience, together with being the son of an insurance adviser, he has the expertise to “tailor” insurance packages for many different types of business & farming operations.

# Wealthpoint Town & Country



## Our partners.

We work with most of NZ's leading insurers:



+ access to many more thru Wealthpoint



# Wealthpoint Town & Country



## Contact.

### Phone:

Kim on 027 4819 655

Bevan on 021 819 655

Or tollfree 0800 322 466

### Email:

[kim@townandcountry.nz](mailto:kim@townandcountry.nz)

[bevan@towncountry.nz](mailto:bevan@towncountry.nz)

Or [info@townandcountry.nz](mailto:info@townandcountry.nz)

# Wealthpoint Town & Country



## Contact.

Facebook & Instagram:



### Wealthpoint Town & Country

Rather than bombarding your email inbox, we'll post market updates, offers or important info on claims during extreme events on here. Like us to follow our posts.

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## For more information.

### Website:

<https://wealthpointtownandcountry.co.nz>

You'll find lots more info on the website about us; what we do and what the different covers mean – in “plain english”.

You can also find details about our complaints procedure, links to home rebuild calculator, brochures & policy wordings and our disclosure statements.



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## Website:

<https://wealthpointtownandcountry.co.nz>

On this website you'll also find online forms to make changes to your policy incl new address, additional motor vehicle or just wanting a quote. Click into our website, type in the info on the relevant form & press send.

# Wealthpoint Town & Country



## We offer.

A personalised service.

We can regularly be seen at client sites getting to know them & what they do.

We are here to help make insurance easier for people, whether it is putting insurance in place or helping out at claim time. We've been known to turn up with mops, towels & even chainsaws.

# Wealthpoint Town & Country



Good service is a priority for us. We pride ourselves on having clients long-term with many becoming friends.

Our Clients know we are only a phone call away if they need us. We will be here for you, when you need us, year after year.





Thank you for your time.

We welcome constructive feedback & questions.