

# Wealthpoint Town & Country



# Wealthpoint Town & Country



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.

# Wealthpoint Town & Country



## Our aim is to.

Work alongside people who value our advice and are want long lasting relationships for their insurance needs.

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

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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.



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One of our greatest satisfactions is seeing 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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## Who is Wealthpoint.

Wealthpoint is a co-operative owned by a network of more than 50 financial services advisory businesses, who operate 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.

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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.



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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”.



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AMP Adviser Businesses then emerged, and the adviser association continued to represent these businesses.

An  Adviser Business

During this time, you may have known us as Certus Financial Group.

**Certus** Financial Group

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In 2020 (during a covid lockdown), the Sterling family began our own adviser business under the Wealthpoint network.

**Wealthpoint Town & Country**

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

**A member of the Wealthpoint network**

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



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## Why Town & Country.

Since the beginning we 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.

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



Insuring an  
Asset



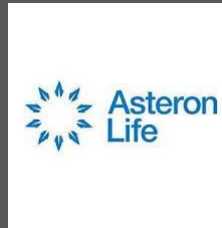
Insuring  
Yourself

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## Our partners.

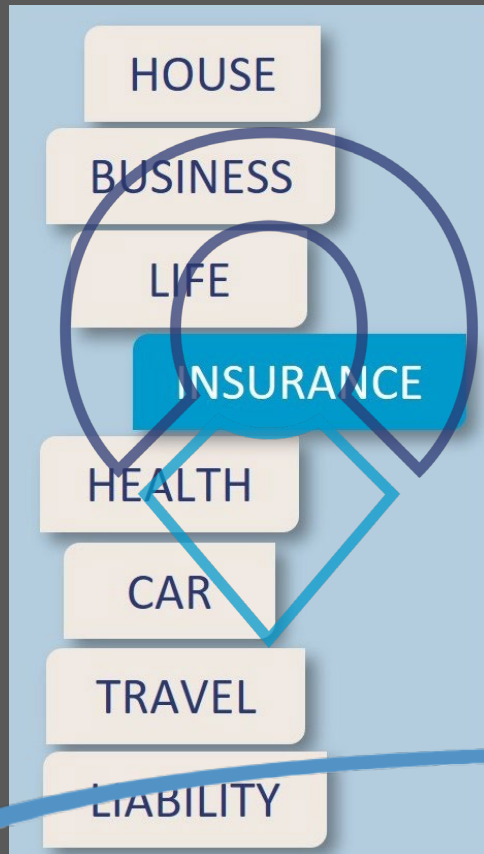
We work with most of NZ's leading insurers:



+ access to many more thru Wealthpoint



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## We offer.



+ many more insurance options. All with a personalised service.



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## Our Directors are.

### **Kim & Bevan Sterling.**

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 25 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.

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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 at claim time.

We've been known to turn up with mops, towels & even chainsaws.

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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.



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## For more information.

### Website:

<https://wealthpointtownandcountry.co.nz>

You'll find lots more info 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 the home rebuild calculator, brochures & policy wordings and our disclosure statements.

There are also online forms to make changes to your policy, get quotes or for us to contact you.

# Wealthpoint Town & Country



## To contact us.

### Phone:

Kim on 027 4819 655

Bevan on 021 819 655

Or tollfree 0800 322 466

### Email:

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

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

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## Or follow us on.

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.



Thank you for your time.

We welcome constructive feedback & questions.

And look forward to getting to know you and help with your insurances.

