



POSITION:

Financial Adviser

CREDENTIALS:

Authorised Financial Adviser (AFA), NZCFS

FROM ANNE:

“My passion is for making a difference in people’s lives, by making financial planning easy to understand and achievable. Ensuring it suits individual needs either in business or personally and to make the changes required to reach your goals as pain free as possible!”.



About Anne

I use a simple and effective 3 step planning process to assist you increase your bank balance, increase your investments and protect your assets and most importantly protect the people you love and care about from unexpected events.

I have 10 years experience in the financial services industry and get the most pleasure from clients reaching their own goals simply and effectively and will always do my very best for them.

I am married to Steve, we have 5 children between us and 2 lovely granddaughters.

I spend most of my time outside of work with family and friends having fun.

“Anne handled our affairs with professionalism, consideration and thoughtfulness which gave us a better direction of where to from here.”

- Oriana Mason

Company Profile

Core Values

All Interests are equal:

- Place the interests of our stakeholders, as equal to our own.

Service

- Show up on time.
- Do as we say.
- Finish what we start.
- Say please and thank you.

Trustworthiness

- CHARACTER (Integrity, Maturity, Abundance Mentality)
- COMPETENCE (Technical Capability, Conceptual, Interdependence)

Ethos

A Great Experience

- Employees and Customers will feel that the company has contributed to their life in a positive way.

Purpose

- Assist clients to achieve financial security through making smarter financial decisions, together.

Our Brand Promise

1. Financial vision & Purpose
2. Help achieve financial goals and security
3. Smarter financial decisions through increased financial literacy