



POSITION:

Director, Financial Professional

CREDENTIALS:

AFA

FROM DEAN:

“I love working alongside my clients to assist them to become financially fit. Together we create a game plan for your financial future.”

About Dean

I am passionate about changing the face of Financial Literacy in New Zealand. I champion this change by running Financial Literacy workshops for young professional groups, corporates, colleges, universities and professional athletes in Wellington, Auckland & Christchurch.

I understand how the unexpected can effect your life both personally and financially having experienced a major event and seeing first hand how this impact can effect you and your family. I have learnt that life is not a rehearsal, so as an Authorised Financial Adviser, I believe we should not just plan holidays and significant events we should plan our lives. Whether it is our short, medium or long term goals I will assist to align them with the 3 key areas of financial planning.

- Cash Management
- Investment Management
- Risk Management

When you have these three cornerstones of financial management in place, you are in pole position to achieve your financial and lifestyle goals. You can be assured of confidentiality and impartial advice when we work together. The greatest satisfaction I get in my work is assisting you in choosing the best solutions for your unique situation.

“Life with a plan is good.

Brad and I are now well on track to leaving for our OE much sooner than we expected (whilst still growing our asset fund), we are always on the same page when we are making our daily decisions, and... We still have a social life.”

- Lauren Rowland

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