



POSITION:

Financial Adviser
Registered Financial Adviser (RFA)

FROM IAN:

“I specialise in working with young professionals who are interested in wealth creation and working with my clients to educate them to reach their financial goals”.

About Ian

As a professional Financial Adviser, my job is to help people grow and protect their wealth to enable them to choose the lifestyle they want. I provide my clients clarity and direction towards their financial goals. Achieving goals such as annual travel, first home purchase, investment properties or providing overall investment strategies for multi generational wealth. My focus is to build long term business relationships with my clients and provide assistance as they progress with their life goals.

To do this I am backed by the success and experience of Foxplan, providing financial advice for individuals and businesses across the Wellington region since 1996.

Doing business with Foxplan means:

- An holistic approach to financial planning
- Honest, courteous and professional service
- Working with a business who has a goal to educate and create a more financially literate New Zealand

I am available to be your dedicated financial Adviser, all of my advice is unbiased, client focussed and centered around achieving your goals.

My commitment to you as a client is

1. Personalised, quality advice.
2. Indepth analysis of your overall financial situation.
3. Ongoing service and review.

“My wife and I would like to take this opportunity to thank Ian. We look forward to not only continuing to use his services in the future but to recommend his high standard of service to our family and friends.”

- Dean and Georgina Tuari

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