> ADVISER PROFILE

Paul Loo

POSITION:

Financial Adviser

Registered Financial Adviser (RFA)

FROM PAUL:

"I have a deep seeded passion to help leave a legacy of opportunities and abundance that last for generations and beyond. ".

About Paul

I have worked in the finance and insurance profession for more than twelve years from commercial lending through to insurance underwriting and Key account Management. I am a member of the Institute of Australian and New Zealand Insurance and Finance with a degree in Accounting and Financial Management at the University of Auckland.

Everyone's economic and life situation is unique, and I keep that in mind when providing financial advice. I believe that personalised service is essential when matching clients with the right financial products and services. As a Financial Adviser, I am dedicated to learning about your personal goals. Together we will use them to build a financial plan focused on your specific needs.

I understand my clients are in different stages of life: you might be purchasing a first home, financing a child's post-secondary education or planning for retirement. I believe a financial plan must reflect your personal or business situation, and so will work to highlight the financial products that best fit your goals. Once your tailored financial plan is in place, we will continue working together to review achievements against your stated aims, and ensure you are confident everything is moving forward according to plan.

I am commited to the development of unique, personal goals which form the foundation of any strong financial plan. My objective for my clients is to give them cash control and certainty for the growth and protection of assets.

If you ever have questions about your plan or about specific financial products, contact me. We will set up a time to meet to review your needs and address any questions you may have..

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