> ADVISER PROFILE

# Sally Killick

FOXPLAN
Smarter financial decisions

**POSITION:**

Director, Financial Adviser

**CREDENTIALS:**

AFA, Grad Dip PFP, CFP[cm],

**FROM SALLY:**

"Sally helps her clients to plan for Life without Work. Whether a planned retirement or an unplanned illness or accident. Providing financial security and peace of mind."

## About Sally

In 1987 the international financial markets suffered one of their most severe collapses since the great depression of the 1930's. It was both sudden and sizable. New Zealanders suffered more than most and that major event made a dramatic political, structural and financial impact on the lives of all Kiwis for the next 20 years.

Sally commenced her career at the end of that year and qualified with International Quality Awards for her first 10 years. An unprecedented initiation of quantity and quality service to her clients in the insurance and superannuation industry of the time.

In 2008, Sally achieved the pinnacle of professional standing - 'Certificated Financial Planner' after completing a post graduate diploma in financial planning through Waikato University. She and her husband John had joined forces to form their financial services company in 1996 with the intention of transitioning into Total Financial Planning.

Now in the pinnacle of their careers, Sally and John reside in Peka Peka after developing their lifestyle block over the last 20 years. Sally's passion for horse riding and living on her own farm saw them develop these 5 acres of sand dune, lupins and boxthorn into their own El Dorado.

From the time they met and married in 1985, Sally and John have practised the art and science of financial and lifestyle planning. They live their dream and walk the talk. 30 years of written goals, measured performance, mutual achievement and individual compromise. A legacy of hard work, ethical standards and success in business through values based ongoing advice and dedicated service to their many individual and mutual clients.

Sally specialises in personal and business insurance, has expert knowledge of the fire and general market and enjoys passing on her planning experience to help her clients secure their financial futures.

*"She explains our finances to us in a language we can understand, and goes out of her way to ensure our future retirement funds meet the lifestyle we have envisioned for ourselves."*

**- Robyn & Niel Harding**

**SALLY KILLICK** > PHONE 04 939 4078 > EMAIL sally.killick@foxplan.nz **www.foxplan.nz**

# Company Profile

FOXPLAN
Smarter financial decisions

## 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

**SALLY KILLICK** > PHONE 04 939 4078 > EMAIL sally.killick@foxplan.nz **www.foxplan.nz**