



**POSITION:**

Specialist Financial Adviser  
Registered Financial Adviser (RFA)

**FROM STEPHAN:**

"I'm motivated helping my clients achieve dreams via planning their way through life's turbulence, & reach their desired outcomes".

## About Stephan

As a specialist Financial Adviser I believe that the best customer service only comes from genuinely caring about my clients and naturally empathising with situations they may face in life. My goal is to help people and businesses overcome unexpected financial speed bumps by giving them the best possible financial advice and solutions available. I understand how the unexpected can affect you and your family's life, emotionally and financially, having personally experienced a major event. Such challenges have given me a unique perspective which I apply when working with my clients.

Personally, I am an experienced property investor with a speciality in lending. I take a holistic view to creating wealth; closely working with your professional team to obtain the best outcome. Professionally, I have a great understanding of the issues business owners face from a variety of roles within the IT industry and decided to join the financial services industry to assist other business owners with business growth, succession planning and risk management.

The greatest satisfaction I get in my work is assisting you in choosing the best solutions for your unique situation: for you to get back control of your finance, have confidence in investing & certainty from any unforeseen events. Originally from Wellington from Dutch parents and married to Janet from Chinese parents has given me an appreciation & sensitivity to NZ's diverse ethnic background. I have travelled extensively overseas (OE 9 years), settling back in NZ in 1995 working in the IT industry as a project manager in Telecommunications.

When I am not working I spend most of my time with my wife Janet and two teenage sons. I am a keen mountain biker, love films, theatre, and I take any opportunity to get out in the hills around Wellington.

*"Stephan has exceeded our expectations and always goes the extra mile for all his clients and keeps you in touch with progress. I would highly recommend him to anyone wanting to purchase their first home or any home or investment property or financial planning services."*

- Jo Reddin

## 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