



POSITION:

Director, Financial Adviser

CREDENTIALS:

AFA, Grad Dip PFP, MDRT

FROM STEVE:

“It is my belief that if we improve Financial Literacy for New Zealanders then we will all be able to make smarter financial decisions together, enabling more financial freedom, less stress, and more time to be with loved ones.”

About Steve

I believe financial control through improved financial literacy will lead to financial freedom, reduce stress, build passive income and ultimately give you more options to fully enjoy the life you really want with your family and friends.

My role is to make financial planning easy to understand, ensure it suits your individual business and/or personal needs, and help make any necessary changes to your money habits as pain free as possible.

I enjoy making the complex world of finance understandable to everyone and measure my success on seeing individuals or businesses reach their personal and financial goals. With over 27 years of experience in financial planning and a no nonsense approach you can be assured I will always do my very best for you.

When I am not at work I enjoy spending time with my family, my wife Annie, our 5 children and playing with the dog. I enjoy couch time in front of rugby and cricket and traveling with Annie.

I am also involved in recruiting and training new advisers into our industry. I have a passion for the growth and development of this fantastic industry.

“In my industry, I have always been fortunate enough to be exposed to a coaching environment, and recognise the importance of coaching and mentoring. What Steve has done for me, is to provide me with a true coach in the area of my finances, just as I had a coach for my refereeing in the world of rugby. Not only does it make sense, it is imperative to have a third party to be challenged, bounce ideas off, and ultimately to monitor progress. For me, Steve is able to encapsulate that role as well as anyone I have worked with. He understands the person, the life ambitions and successfully tailors his responses and suggestions in line with that individual. I would recommend Steve to anyone!”

- Lyndon Bray – SANZAR Game Manager

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