> ADVISER PROFILE

Warwick Walker

FOXPLAN
Smarter financial decisions

POSITION:

Director, Financial Professional

CREDENTIALS:

AFA, Grad Dip PFP, CFP^{cm}, Life & Qualifying Member MDRT

FROM WARWICK:

“My commitment to people who choose to work with me is simple; I will care more about your business & personal financial success than anyone other than your family”.

About Warwick

Everyone has a financial plan - it just depends whether your plan is by default or design? When I meet with you, I firstly listen to what you're trying to achieve financially. I then look at the strategies or plans you already have in place. Then I'll put a Tick, Question Mark ? or Cross X beside those strategies, highlight any gaps and recommend what you might do to address them.

My practise is limited to 200 business owners / professionals & their families plus a small number of pro bono clients I assist each year. If someone else is cheaper or gets better returns or cheaper products for a year or two I don't think that matters much in the long run, because the right adviser is the one you & your family trust the most. If that is me, thank you.

Relationship will be based on:

1. Give it to you straight: I will tell you the truth, never sugar coated.

2. Recommend not ask: I relate to people by understanding what they want to do. Once I think I have correctly diagnosed your situation I will recommend, strongly, what you need to do.

3. Responsibility: I can't stop you following any other course of action, but I can't be held responsible for your choice if it does not work.

4. No Guarantees: I won't argue, guarantee an outcome or predict the course of your plan. I'll tell you what works best most of the time, what the next step will be if that doesn't work.

5. Price: I never try to gain clients by competing on price, or recommend investments or insurances based on performance or cost. Value & certainty of outcome is most important.

6.Action: Results come from taking action not having a plan. Action must come from you. I help keep you on track.

“Warwick’s advice and the financial plan that we eventually developed, has been life-changing (and I do not say that lightly). We only wish we had done something like this earlier in our lives.”

- Keith Calder

WARWICK WALKER **> PHONE** 04 918 4650 **> EMAIL** warwick.walker@foxplan.nz **www.foxplan.nz**

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

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