



Financial Advice

NEW ZEALAND

Your Professional Body



JOIN US
Become a member today



WHO WE ARE

We are your professional body; for lending advisers, risk advisers, investment advisers and financial planners.

We believe Financial Advisers provide a highly valuable service and can make a meaningful difference to the lives of New Zealanders.

We are here to support and promote our 1,570 members as quality professional advisers.

As a sector we are well on the way to transitioning financial advice into a profession.

Here's what we are striving for:

- a respected profession that plays a meaningful and valued role in helping Kiwis thrive
- a profession that delivers a prosperous, successful business and career opportunity for advisers
- a profession known for leadership - not just adhering to minimums driven by regulators.

These are just a few of the goals we have in mind at Financial Advice New Zealand.

WHAT WE DO

Through our three pillars of standards, advocacy and promotion we are committed to spreading the word about the value of advice and to helping more New Zealanders access quality advisers.

We are focused on using our united voice to advocate for the benefit of advisers, and for the New Zealand public.

On your behalf we talk with the regulators and legislators to ensure your voice is heard before decisions are made.

We also actively support our members through regulatory and legislative changes with a helpline, workbooks, webinars and more.

WHAT OUR MEMBERS SAY

“ Our Association’s CEO is engaging and inclusive, our Head Office team is supportive and helpful, and our regional meetings provide excellent subject matter for continued professional development. I enjoy the networking opportunities at these meetings, and I have developed trusted relationships to refer my clients to.

With regular meetings, seminars and webinars, together with weekly emails from Head Office, I feel better able to manage the challenging legislative environment and deliver quality advice to my clients with the trusted support from our Association.”

Sheryn West, Mortgage Adviser

“ It can sometimes be hard to measure the benefit of belonging to an industry body, but we never hesitated in belonging to Financial Advice New Zealand as our clients expect it.

Coming together as individuals at this time of legislative change, we need to have a loud and consistent voice to our regulators and consumers.”

Tim Fairbrother, CERTIFIED FINANCIAL PLANNER^{CM}

JOIN US

We know we are in changing times. Financial Advice New Zealand is here to support you to make the best decisions to ensure you and your business prosper in the coming years.

The 1,570 members of Financial Advice New Zealand are part of a professional body that seeks opportunities to make a positive difference. We strive to advocate for members' needs. We work tirelessly to help build a thriving future for financial advice, in an environment that understands and supports what you need as an adviser. By joining us you will have:



Resources and guidance to help you understand regulatory obligations and licensing options.



On-going professional development with access to an online portal to log your CPD hours and record your learning.



Regular live and recorded webcasts to keep you up to date with industry changes.



Weekly newsletters highlighting key industry issues and reports.



Access to internationally recognised certifications for insurance and financial planning.



Media and marketing strategy to educate the public on the value of quality financial advice.



Your voice represented to key regulators and legislators.



Networking opportunities: 650 attendees at our annual national conference.



Regular regional meetings with CPD and networking opportunities



Access to discounts from a range of suppliers.



Optional access to discounted Group Life & TPD Insurance.



Optional access to Liability Cover individually suited to your needs.



Online promotion of your profile on our public facing and promoted website.



Social Media promotions and collateral for you to adapt and use for your own promotions.

Standards

Together we will build public confidence and trust in financial advice. Our members will be known for their commitment to quality.

Advocacy

We are your voice, dedicated to a fundamental goal: to build the framework that best supports you in providing quality advice to New Zealanders.

Promotions

We will actively and consistently drive awareness of the value of quality advice, and the role our members play in helping Kiwis thrive.

MEMBER BENEFITS

01.

N3

Facilitated by n3's group buying program and through the Trade Card App, receive discounts at New Zealand's best, most trusted suppliers such as Noel Leeming, OfficeMax, Avis and Budget Car Rental, Millennium Hotels and Resorts, NZ Couriers, Bunnings Warehouse and many more...

02.

Dell Technologies

Dell Technologies offers Financial Advice New Zealand members access to an array of valuable benefits including special discounts, access to dedicated Small Business Advisors and payment solutions.

03.

Business Desk

Get quality, balanced insight and analysis from writers like Patrick Smellie, Jenny Ruth and more at BusinessDesk.co.nz. Members get \$50 off new individual subscriptions and 10% off new group subscriptions for up to 50 users.

04.

IPayHero

PayHero is payroll software designed to help New Zealand companies pay employees right. Incorporating online timesheets, employee self-service, leave management and automated payday filing, PayHero provides payroll solutions for Kiwi businesses of any size. Financial Advice NZ members new to PayHero are eligible for their first two months free.

05.

Discounted Group Life and TPD Insurance

Financial Advice New Zealand in conjunction with Mercer Marsh Benefits™ (MMB) offer a Group Life and TPD Insurance plan for Financial Advice New Zealand members.



DELL Technologies

BusinessDesk.

 PayHero[®]

APPLY TO BECOME A MEMBER TODAY

Contact us at info@financialadvice.nz 0800 432 101 or apply online at www.financialadvice.nz/apply-now