



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.

With a growing membership of over 1,500 advisers we are here to support and promote our 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 environment and career opportunity for advisers
- a profession known for leadership - not just adhering to minimums driven by regulations.

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

WHAT WE DO

Through our three pillars:

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

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 regulators and legislators to ensure your voice is heard before decisions are made.

WHAT OUR MEMBERS SAY

“ We joined Financial Advice New Zealand because of the vision to champion the role of quality advice, to invigorate pride and trust in our profession to help New Zealanders thrive. As a professional industry body Financial Advice New Zealand continues to deliver on that promise. One collective voice, raising standards, influencing policy, and promoting quality advice. ”

Dean Logan, Financial 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.

As a member of Financial Advice New Zealand you are part of a professional body that seeks opportunities to make a positive difference. We strive to advocate for members' needs and 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 Ontrack by Kaplan Professional to log your CPD hours and learning.
- Regular live and recorded webinars to keep you up to date with industry changes.
- An opportunity to obtain the Trusted Adviser mark - a way to differentiate yourself in the market, showing a high level of qualification, experience and ethics recognised by a professional body
- 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: Over 500 attendees at our annual conference and regular regional meetings and CPD.
- Optional access to Professional Liability Cover individually suited to your needs.
- Optional access to discounted Group Life & TPD Insurance.
- Weekly newsletters highlighting key industry issues, reports, and articles to share with your clients.
- Online promotion of your profile on our public facing and promoted website.
- Access to discounts from a range of suppliers.

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.

Promotion

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.

**Access to
Ontrack
by Kaplan
Professional**

This modern and dynamic learning management system has been customised specifically for the needs of financial advice providers and financial advisers. It provides an effective solution for meeting compliance obligations for CPD and record-keeping.

02.

**Other
supplier
discounts**

Access to other discounts for your business from Dell Technologies, Business Desk and PayHero.

03.

**Professional
Liability
Programme**

Brought to you in partnership with Curated Risk, our Professional Liability programme is tailored specifically for your requirements as a financial adviser. There are three distinct parts to the programme being: Professional Indemnity Insurance, Management Liability Insurance and Cyber Risk Liability Insurance. We consider the programme will provide you and your FAP with the cover you require to provide financial advice in the new regime.

04.

**Discounted
Group Life and
TPD Insurance**

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

 **ontrack**

by Kaplan Professional

BusinessDesk.

 **Dell Technologies**

 **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