



## Trusted Adviser Designation Guidelines

Congratulations on being awarded the Financial Advice NZ Trusted Adviser designation.

### Benefits of using the Trusted Adviser designation

- The designation supports increased trust amongst partners, consumers and other stakeholders.
- It represents your commitment to competence, professionalism and ethical focus.
- Visually represents your connection to New Zealand's authentic voice and professional association for financial advice professionals.
- This designation differentiates you as a financial advice professional in the market.
- Shows your competence, professionalism and ethical focus.

### Use of the Trusted Adviser designation

Only qualifying members who have received confirmation from Financial Advice NZ can use the Trusted Adviser designation representation. As anyone can use the words "trusted adviser", we strongly recommend you use the designation representation and not the words to promote yourself. It is only the representation image which will be protected under trademark.

At present only individual advisers can qualify to use the designation, therefore it must be used in direct relation to an individual adviser's name rather than the firm's name.

### Link to Trusted Adviser page on the Financial Advice NZ website

When shown on a website, or other digital platform, please link the image of the Trusted Adviser designation representation to this page on the Financial Advice NZ website - <https://financialadvice.nz/your-trusted-adviser>

### What you can do to promote yourself as a Financial Advice NZ Trusted Adviser;

Add the Trusted Adviser designation representation to;

- a qualifying adviser's name in your "About Us" or "Team" section of your website,
- email footer,
- business card,
- LinkedIn profile,
- your brochures, signs and other marketing collateral but only if it can be directly linked to the name of an individual adviser.

### Size & colours of designation

- Please ensure the designation representation is sized proportionally to your firm's logo. The Trusted Adviser designation should be visibly smaller than your firm's logo to ensure there is no mis-understanding about the role of Financial Advice New Zealand.
- The Trusted Advice designation representation should be large enough to enable people to read the Financial Advice New Zealand line.



*For white or light backgrounds – preferred logo*



- For a white or near-white background, we prefer you use the full-colour version of the designation. You can also choose to use the black version.
- For dark backgrounds, please use the white version of the representation. For all colours, please ensure the ribbon aspect of the representation is clearly visible.
- You will be provided with PNG and AI file formats. AI (vector) is best for giving to designers for printing business cards, brochures etc. PNG is best for web and email.

*Alternative for white or light backgrounds*



**To protect the integrity of the mark please:**

- Don't use the representation in a way that implies your firm has Trusted Adviser status. At present only individual advisers can qualify to use the designation.
- Don't show the designation next to the name of an adviser who has not been confirmed as a Financial Advice New Zealand Trusted Adviser, or is no longer a member of Financial Advice New Zealand or who has been advised they no longer qualify to use the Trusted Adviser designation.
- Don't try to explain what a Financial Advice NZ Trusted Adviser is on your website or other marketing collateral. Instead, link to this page on the Financial Advice NZ website <https://financialadvice.nz/trusted-adviser/>
- Do not represent that the designation provides any form of guarantee or warranty by Financial Advice New Zealand to members of the public or to any other party.

If you have any questions, please contact Financial Advice NZ, [info@financialadvice.nz](mailto:info@financialadvice.nz) or 0800 432 101