Industry Perspectives

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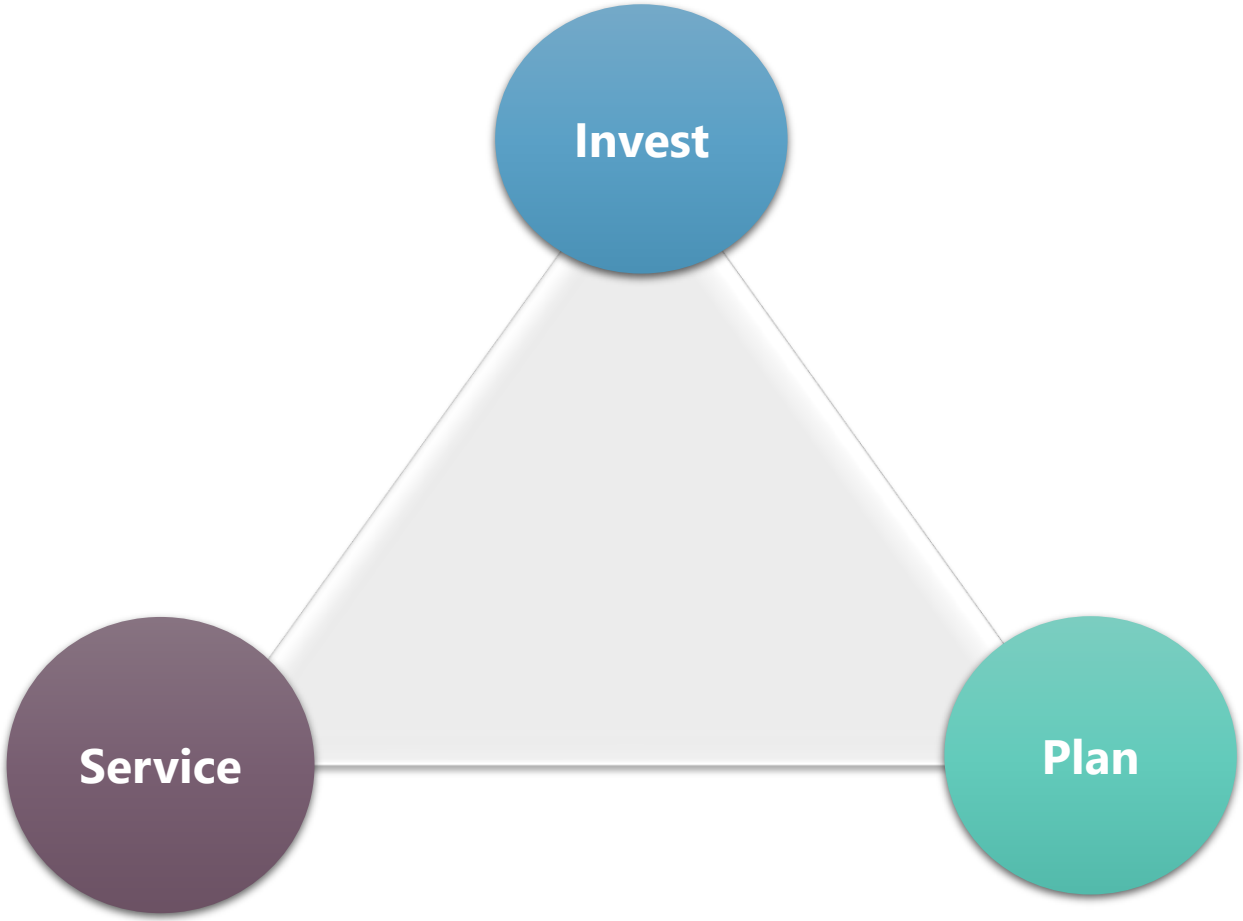
Roles of an adviser



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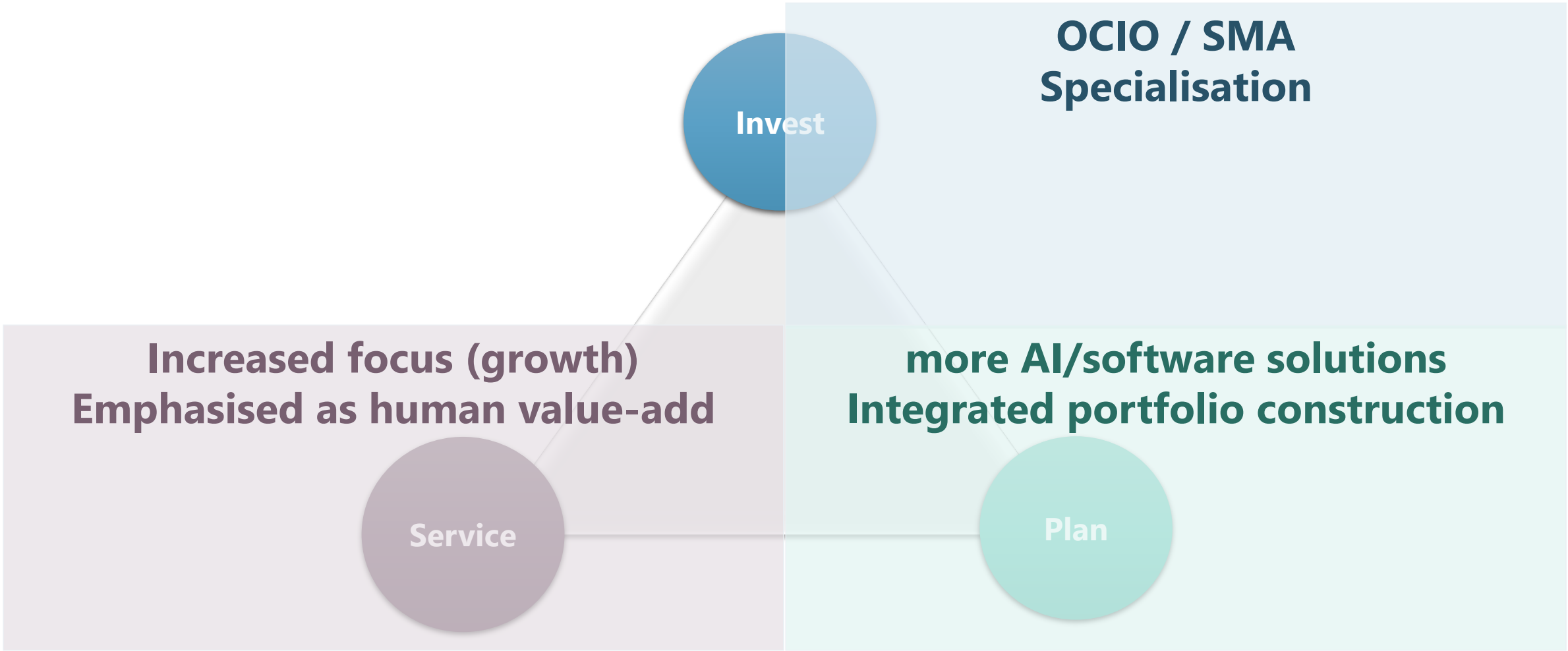
… and how it could change



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What are we working on?

Investments

- Specialisation: Alternative model portfolios

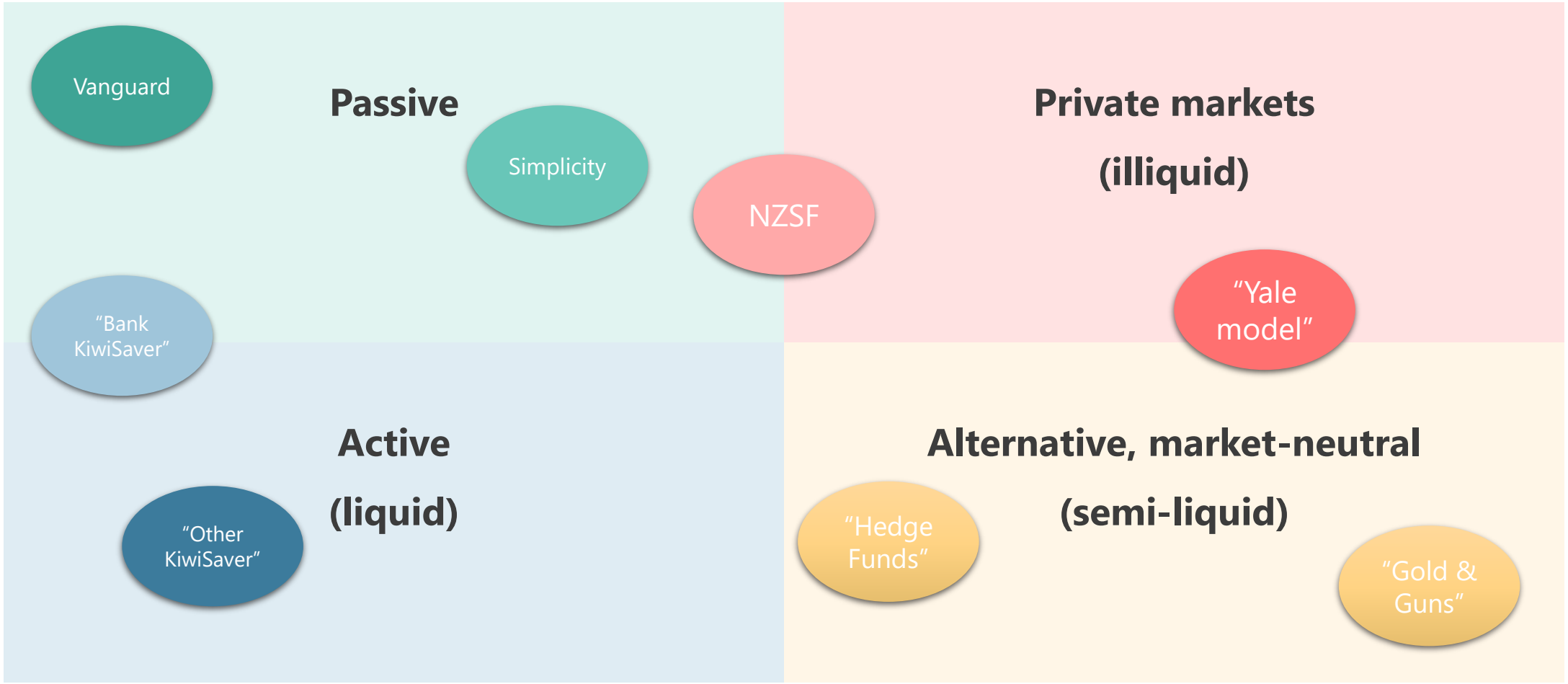
Financial Planning

- Software solution for financial advisers in New Zealand to address planning complexity and portfolio construction needs

Specialisation

- What is your USP?
- What are your investment beliefs?
- How do you differentiate your offering from your competition?
- What do your clients need and want?

Where do you sit?



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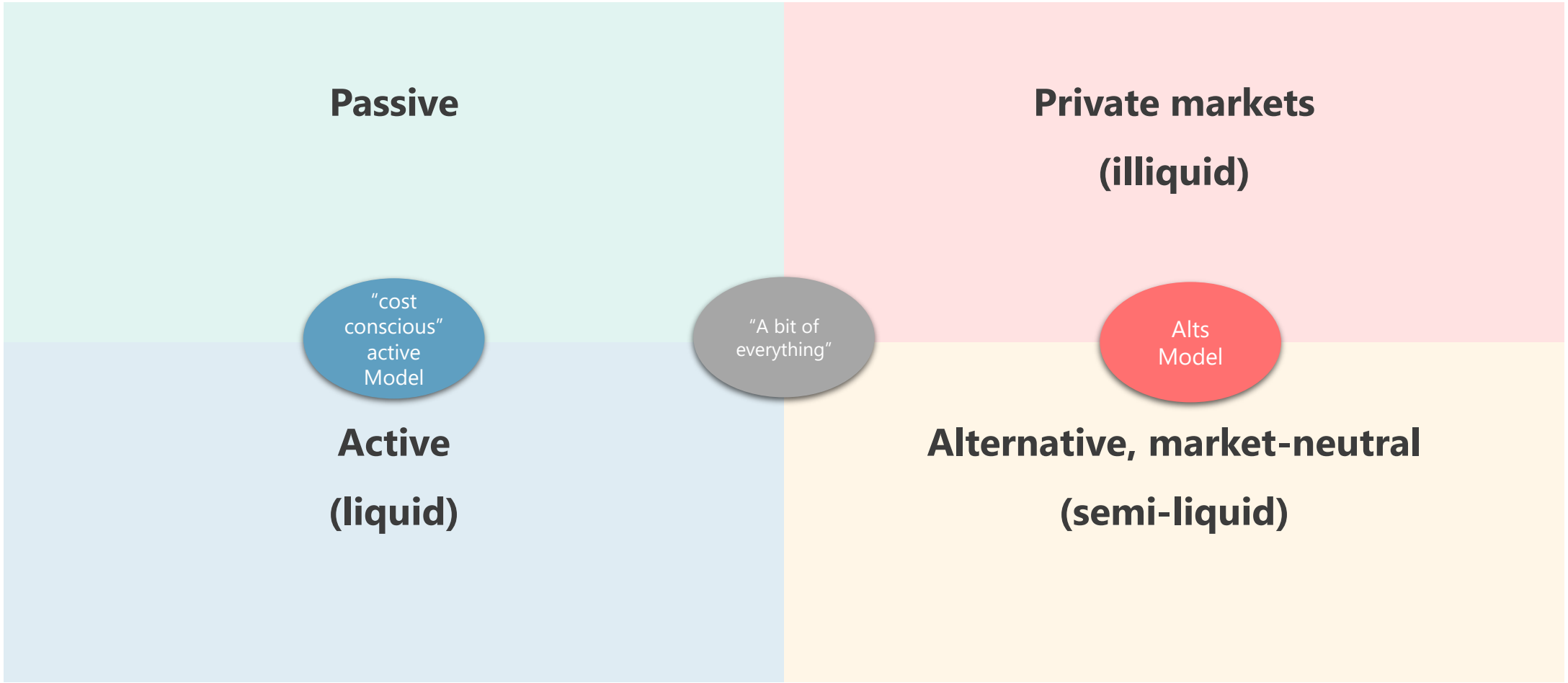
What do you need for your clients?



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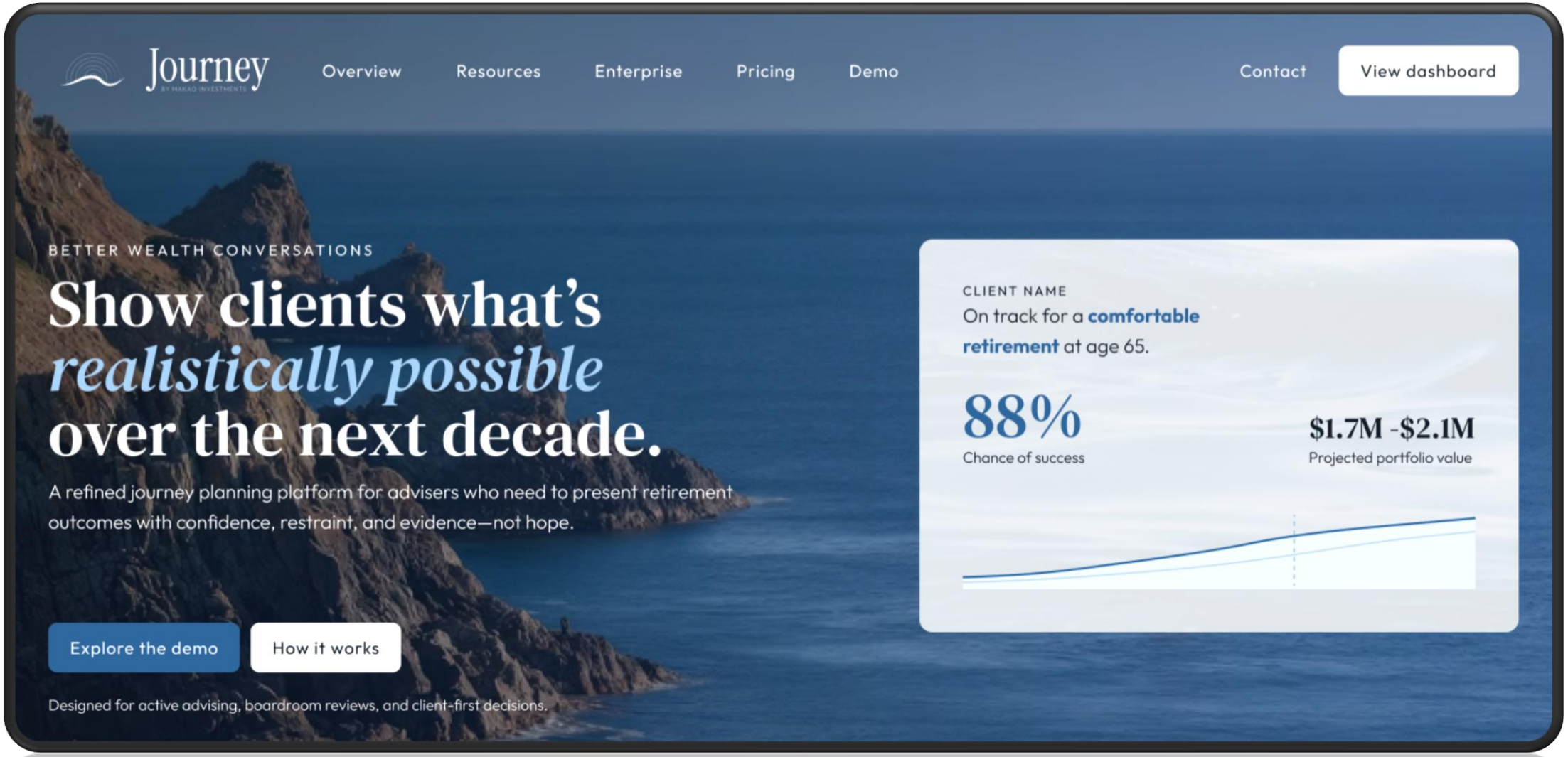
Journey – Coming Soon



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Journey – unique features

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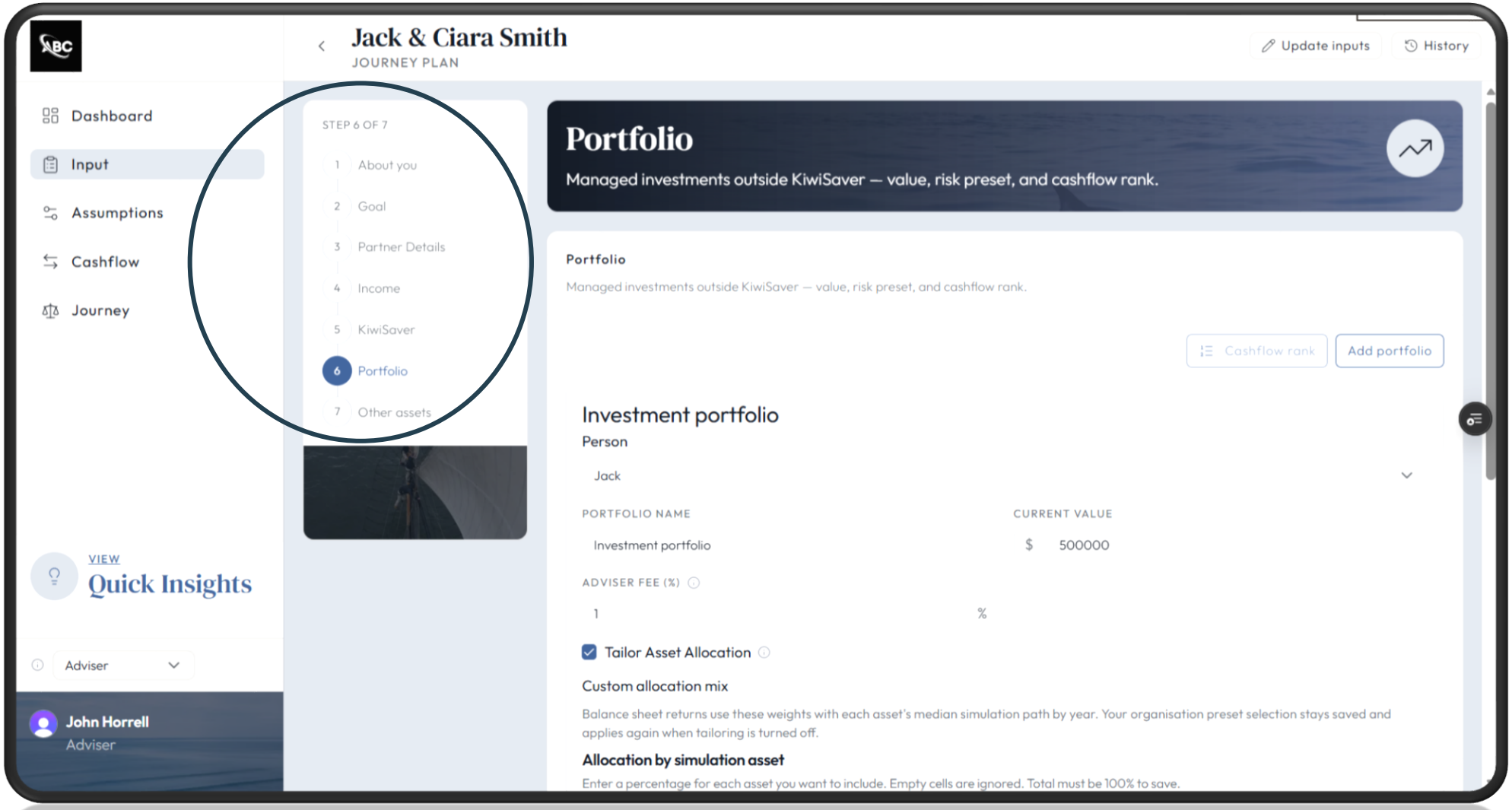
Customise portfolios for specific clients



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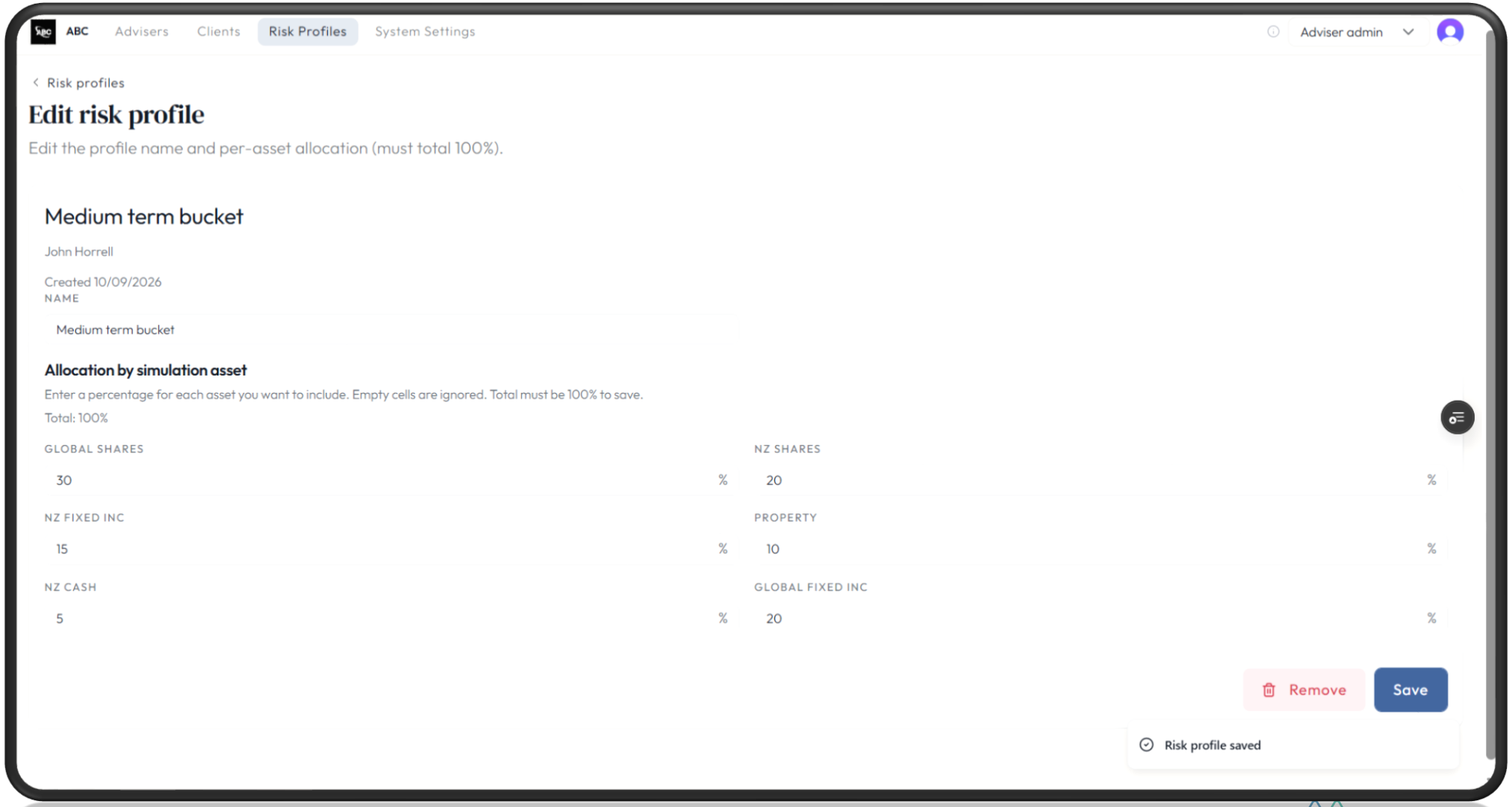
Model portfolios your way



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Scenario analysis - Tell the full story

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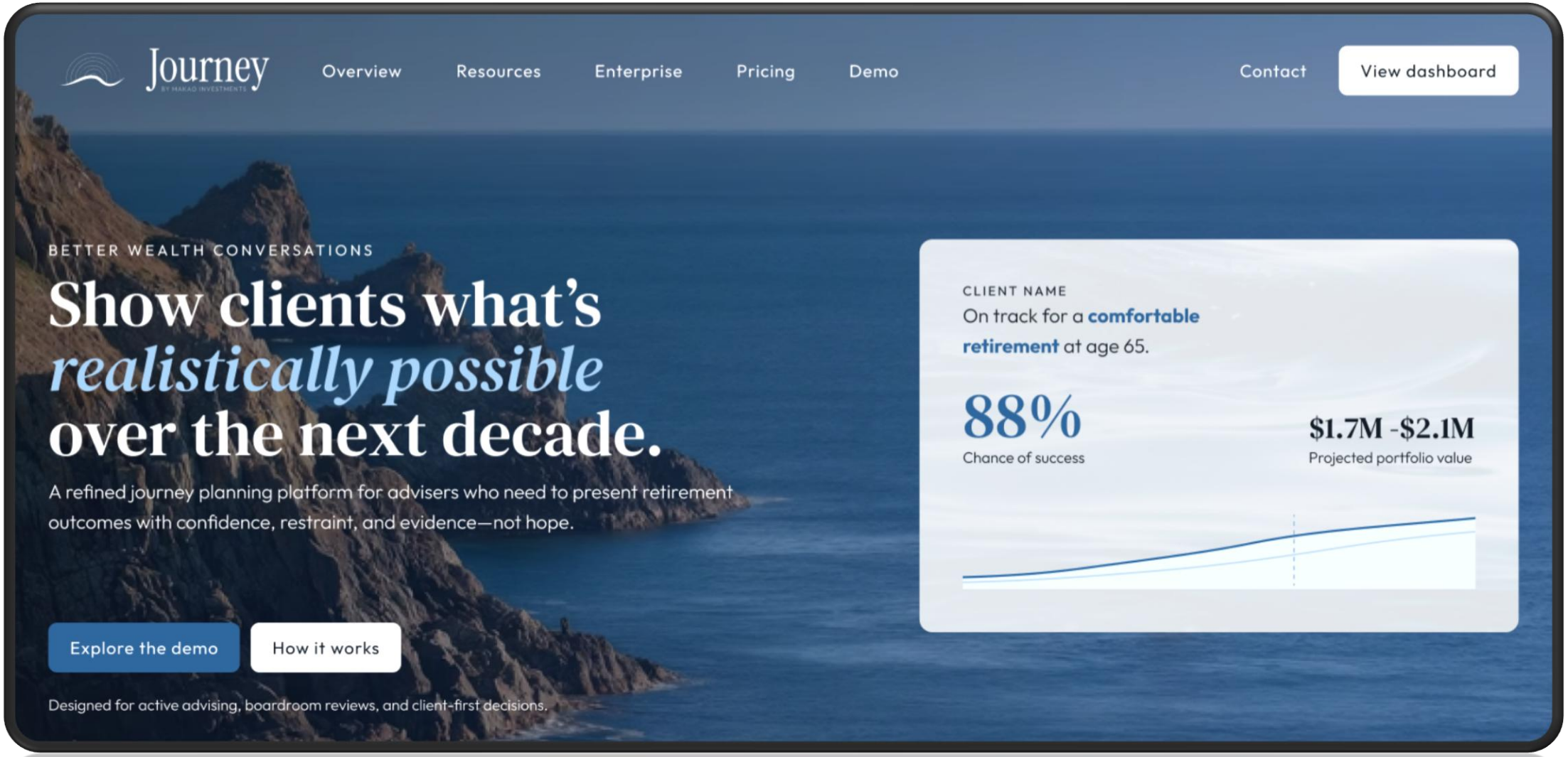
Get in touch if you are interested



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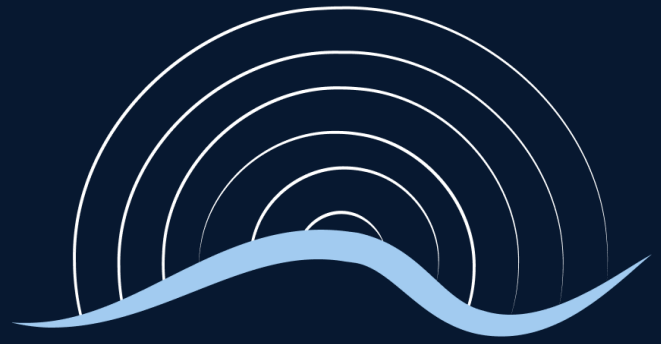

Journey

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Integrity

Transparency

Humility

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