

Your Long Term Investment Partner

Who are we?

FANZ is a goals-based financial advice provider and fund manager that has been helping Kiwis meet their long-term financial goals for nearly two decades. We are owned by SBS Bank, a 100% Kiwi-owned mutual with a 150-year track record for looking after members' money.

Who do we help?

The short answer is everyone. We serve Kiwi individuals, partners, families, trusts, and charities across Aotearoa. However, we also help newcomers and future Kiwis who may be looking to invest as part of their immigration requirements. It doesn't matter if you are still accumulating or starting to draw down your assets, we're with you.

Adrienne Zwarts

Financial Adviser

Adrienne has extensive banking experience and has specialised in financial planning for the past 20 years. She has been working with the SBS group since 2018.

Adrienne works hand in hand with clients, understanding their needs and financial goals in order to guide them through their financial journey. She is continuously developing her expertise and is always up to date with the latest developments in financial advice.

Outside of work, Adrienne enjoys spending time with her family, walking the dog, and attending the gym. You will find her most weekends working in or enjoying her garden.

A disclosure statement is available on request and free of charge.

Specialist Areas

- Wealth Management & Accumulation
- Portfolio Management
- Investment Advisory
- Retirement Planning
- KiwiSaver

Industry Experience

- Financial advice
- Mortgage Broker
- Retail Banking

Qualifications & Memberships

- Certified Financial Planner (CFPCM)
- Certificate in Financial Services (Financial Advice) Level 5
- Graduate Diploma in Business Studies in Financial Planning
- Financial Advice New Zealand
- Institute of Financial Professionals New Zealand (INFINZ)

☎ 021 305 798 (DDI) | 0800 727 2265 (contact centre)

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WHAT WE DO

Financial Advice

Achieve your goals

Good advice can be hard to come by, but not at FANZ. We specialise in advising Kiwis and being a trusted partner on their long-term investment journey. Our advice is goals-based which means it's all about you and what you want to get out of life. When you sit down with one of our financial advisers, you can expect to receive a personalised plan for your situation and access to the right investment tools for the job.

Here's what to expect when you talk to one of our team.

— GETTING TO KNOW EACH OTHER

It's your financial adviser's job to be the co-pilot in your financial life. To do this they need to figure out what is important to you, where you want to go, and ensure you take the best route there. You also need to get to know your adviser as they will be with you through thick and thin.

— MAKING A PLAN TOGETHER

A plan sits at the foundation of everything. It tells us where you want to go and how you're going to get there. It creates a process for keeping you on track and then recommends the investment solutions that are the correct fit for you.

— ACHIEVING YOUR GOALS

With a plan in place, it's time to get you started on your journey. This involves your financial adviser taking all the pieces of your financial life and putting them in order, as well as making sure they stay that way over time. This means they will be checking in with you as much as you need to ensure you are on track.

Portfolio Services

Manage your wealth

Whether you are looking to protect what you have or see it grow, managing your wealth requires the right approach. We can help by creating portfolios optimised for;

- sustainability;
- tax efficiency;
- active management;
- income generation; and
- immigration requirements.

Our team can work to ensure you get the perfect portfolio to help you get you where you need to go.

KiwiSaver

Prepare for your future

Saving for the future is one of the biggest challenges faced by many Kiwis over their lifetime. KiwiSaver is a national initiative intended to give most people in New Zealand an easy way to regularly put money aside for their future, particularly retirement or a first home. It comes out as a percentage of your pay and, while you're contributing, your employer must also make contributions. Even better, the government chips in every year if you meet certain requirements.

The Lifestages KiwiSaver Scheme has options suitable for all risk profiles from conservative to high growth. You can select the option that is right for you or opt into the "Lifestages Auto" profile which will adjust your profile to match what we believe is appropriate for your age. If you don't know what option is right for you, our financial advisers can help you decide or answer any other questions about the scheme – all at no additional cost to you.