



# NEW ZEALAND FINANCIAL PLANNING

*Helping you make smart choices with your money*



*“Financial planning requires a holistic approach”*

## Alan Lawton

CFP<sup>CM</sup>

Alan Lawton is a Senior Client Adviser in NZFP's Wellington office.

He has worked as a financial planner since 1989 when, after completing the IPAC Securities Course on Financial Planning and Securities Dealing, he joined Ernst & Young to set up their Financial Planning Division. Two years later in 1991, Alan attained his financial planning qualification.

Alan has a wide range of individual clients and also liaises with intermediaries acting on behalf of their clients in Wellington, Palmerston North and New Plymouth.

Alan takes a holistic approach to financial planning, identifying the life goals and needs of the individual taking into account estate planning, tax minimisation, and investment strategies (including asset allocation and diversification) in determining the best plan for them.

Wellington-born, Alan has been President of Victoria University Cricket Club since 1989 and is Past-President of Wellington North Rotary Club and is a Paul Harris Fellow. He is also a member of New Zealand Financial Planning's Management Board and a company director.

Whilst his other interests include golf, walking, reading, music and sport in general, his passion is cricket. Alan has toured India, England, Australia and various parts of New Zealand with the New Zealand Rotary Cricket Team, playing against other like-minded Rotarians.

### WELLINGTON

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# Where to find us

New Zealand Financial Planning Advisers are available at all of the following offices:

## AUCKLAND

<b>Address</b>	Level One, NZ Finance House, 52 Swanson Street, Auckland City
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## TAURANGA

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## CHRISTCHURCH

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You may request a full adviser disclosure statement, free of charge, by contacting any one of the above offices.

For more information on our people and services please visit our website

<http://www.invest.co.nz>

