



NEW ZEALAND FINANCIAL PLANNING

Helping you make smart choices with your money



*“Financial Planning . . . it’s all about
‘lifestyle’. Achieve it, live it!”*

Neville Caird

CFP^{CM}

Operating as a Specialist Financial Planner in Otago since the late 1980s, Neville’s business has always been about working with people keen to benefit from personal financial advice and guidance centred around their specific needs and requirements.

This generally involves establishing a strategy to achieve outcomes to support a desired lifestyle both for today and over the years ahead. The investment of money is generally only one of the critical “areas of advice” Neville addresses and he is well aware how important highest practice and ethical standards are when making recommendations on other people’s money and assets. His belief has always been.....if you can’t defend your advice in a court of law, then you shouldn’t be in this business!

A Certified Financial Planner^{CM} Professional, Neville is also a Member and sits on the board of the Institute of Financial Advisers and is the immediate past-Chair of its Otago branch. He has been a Rotarian since 1990 and is a “Paul Harris Fellow”. Neville also sits on the Board of the JR McKenzie Trust and the JAYAR Charitable Trust . He is currently and has been a long serving committee member of Otago Junior Tennis.

“Lifestyle planning” is important for Neville and his family. Not only do they actively practice Neville’s personal financial planning message they have always believed in maintaining a balance between business and family time, a lot of which is spent on their 2.6ha property of 16 years on the outskirts of Dunedin.

In many ways, Neville’s approach to life complements his financial planning business – discipline, commitment, detail, time, friendships and results are words that immediately come to mind.

DUNEDIN

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Where to find us

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

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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>

