NAKED FINANCE

THE NAKED WAY, ALWAYS.....

Supporting everyday Kiwis with their financial needs

Mortgages

Insurances

Investments

Planning

09 416 4357
www.nakedfinance.nz
support@nakedfinance.nz

2/2 Boundary Road,
Hobsonville, Auckland 0618

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Our story

Naked Finance began life as three friends who decided that they wanted to see Financial Advice done differently, all leaving their respective large Multi-National Firms in favour of a more personal approach.

We recognise that navigating financial jargon and processes can, in certain instances, be rather intimidating. Additionally, the enduring kiwi philosophy of “She’ll be right” often influences our thinking. This mantra that has become synonymous with Kiwi culture is a great strength but can also be limiting. We all know that hindsight is 20/20, so at Naked Finance our goal is to help you avoid moments where you realise that acting earlier would have made your present situation much brighter. We're here to make sure you don't miss out on the opportunity to enjoy a rosier outcome. With this in mind, our primary focus revolves around enhancing financial literacy and deciphering industry jargon, ensuring that the entire journey becomes easily understandable and maybe even enjoyable!

Our approach

We take a very holistic approach and try to find out as much as we can about our clients in order to give quality advice that is relevant and specific. Our advice process can be outlined as follows:

Initial meeting
Your initial meeting with a Financial Advisor will provide an introduction to the financial planning process and services offered.

Fact find
The fact-find document is used to collect qualitative and quantitative information about your personal and financial objectives. This information is then used by your Advisor to make personal recommendations.

Research and analysis
Your Financial Advisor will analyse your current situation and consider how they can improve your financial position in order to reach specified goals and objectives.

Provide financial advice
You will be presented with a written Advice Report. This report will provide details of the advice we are providing along with recommended product providers and their associated charges.

Review
Your financial plan should be reviewed periodically to assess progress and see if any changes are required.

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Four pillars

We don't just offer advice on individual aspects of your finances. We look at the big picture, and how these key areas interact and work together to bring you a cohesive, comprehensive financial plan tailored to your personal needs and future goals. Whether you're just starting out, you're looking to grow your wealth, or you're planning for retirement.

Our services

We offer a wide range of services. As part of the process, we will carefully research and recommend the best possible products in the market for your requirements during your regular reviews with your adviser and a dedicated client services manager.

Mortgage

If you have ever tried to call a bank? you will know the pain, imagine trying to compare 25+ providers! Let us do the research for you then you can make a fully informed decision.

Health & Life Insurance

As your life changes, it is likely your insurance requirements will change too. We will ensure your loved ones remain protected from life's uncertainties.

KiwiSaver

Many people don't realise that the cost of an advisor is built into the fees you pay, lets work together to maximise your retirement pot. Working with top performers in the market and we can offer a comparative analysis.

Full Financial Review

We will conduct a full review of your assets and liabilities and discuss your future aims and objectives. We will then create a life plan, taking into account all income streams to provide a tax efficient proposal for drawing an income.

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How they all connect

Client Risk Management

Accounting

Tax Planning

Look Through Companies

Assets/Liabilities

Insurance

General Insurance

Personal Insurance

Estate Planning

Medical Insurance

Income Protection

Life Insurance

Terminal Illness Cover

Policy Ownership

Banking & Investment

Financial Planning

Personal Accounts

Joint accounts

Credit Cards

Persoanl Loans

Mortgages

KiwiSaver

Legal

Up to Date Wills

Trusts

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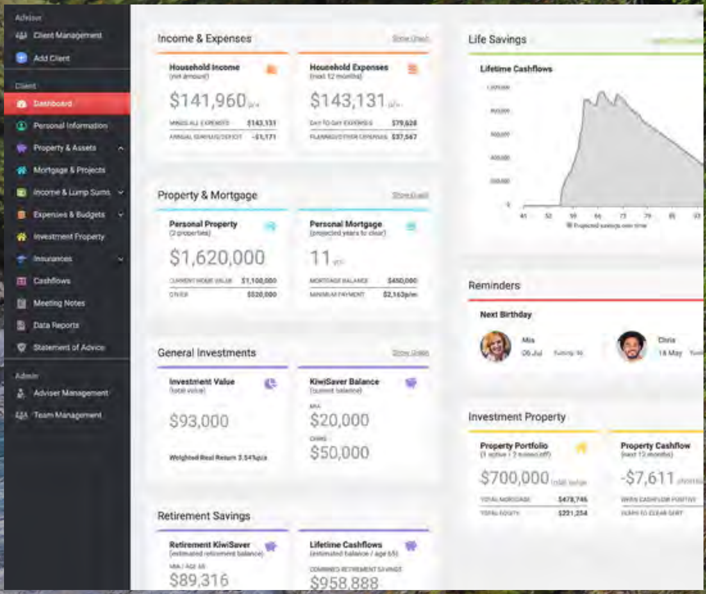
Resources

Cashflow modeling software

As a client, you and your family would have access to our revolutionary lifetime cashflow modeling software. Seamlessly track your retirement plans and achieve financial goals like accelerating mortgage payments. Unlock insights into your future finances and make informed decisions with ease. Take control of your future and turn dreams into reality.



Budgeting tools

Discover the power of financial control with cutting-edge budgeting tools. From our website or through our trusted partners, access a range of intuitive solutions that streamline your finances. Take charge of your money, track expenses, and achieve your goals effortlessly. Start your journey toward financial freedom today.

What we stand for

Culture is Key

Our aim is to create an environment that people want to be part of, be that clients, staff and key stakeholders. We want everyone the company touches to achieve financial freedom in their own way.

We bare all, even the uglies!

We operate in an industry where tough conversations need to be had, we will not gloss over the facts, we will bare all to you, staying true to our ethos and allowing you all the information to make an informed decision.

We know what's important to you

We know because we take the time to ask, we do this because we care, we want to understand your unique journey so we can ensure the advice we offer is tailored to your personal goals.

Beat the statistics!

When you look at the financial statistics of the everyday consumer in NZ they can be quite bleak, out aim is for all of our clients to beat the stats and achieve life benchmarks earlier than the average.

The team

At Naked Finance, we value you and your finances. We take the time to understand your lifestyle, circumstances, and financial goals, in order to provide the best solutions - tailored for you. Let's meet the team who supports the advice process:

Sean Clark
Director

Liam Bratton
Director

Jamie Reynolds
Director

The landscape of Financial Advice in New Zealand has changed in recent years and the need to get the right advice has become even more imperative. Between the Directors at Naked Finance there is over 30 years of experience in financial markets. Rather than being Jacks of all trades the decision was made to specialise in different fields of Financial Advice. This ensures that all our clients get the best possible advice without the need to have multiple points of contact. Our aim is to keep our clients lives as simple as possible. Thus, giving them more time to do the things they love with the people they love.

Sarah McLea

Sarah is the one that keeps it all together for the team. She is exceptional in making sure all documentation is correct and ready to be sent to the relevant parties so that advice is provided in the most efficient way possible. She is a vital asset to both clients and the team.

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