

Who is RIVAL Wealth?

RIVAL Wealth opened for business in 2008 at the beginning of the Global Financial Crisis. Our passion is to encourage people to 'challenge' their financial positions and make better financial decisions.

How would financial advice help me?

Making informed and educated decisions about your money is important. Here's a taste of some of the areas we can help people with.

Cash management: The foundation of financial planning - telling your money where to go instead of wondering where it went

Debt management: There's good debt and bad debt - knowing the difference and how to become debt-free sooner

Savings, investments & KiwiSaver: Knowing your appetite for risk and being in the right fund for your stage of life, so you can grow your money and plan for your retirement

Health, life & income insurance: Making sure your family will be financially secure if the unexpected happens

Estate planning: Having the legal aspects like a Will, Powers of Attorney and if required guardianship, so the money and belongings you leave behind go to the people you want

I'm not sure whether I really need financial advice, what should I do?

Just come and have a chat with one of our advisers. Everyone's situation is unique so we meet with you, listen to your needs then discuss if you want us to design a financial plan that is tailored just for you. The plan contains all our recommendations to help your financial future. We don't charge for our first consultation and if you decide to go ahead with any of our recommendations, if there are any fees or charges, we will make sure you are fully aware of any costs involved.



*We assist clients to be financially successful
through educated decisions which **create, protect
and grow** wealth*