

To go far, go together



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So, for those of you who are not familiar with how RIVAL Wealth began, Tim and I returned to Masterton in our late 20's, bought a house, got married and started our own Financial Planning Business, right in the middle of the Global Financial Crisis. We have just celebrated 17 years operating, with an amazing team of 23, helping clients nationwide get financially organised and to make educated financial decisions.

It would be amiss not to recognise some of founding values were inspired by the late Arja van der Kooy, who joined us at RIVAL Wealth in 2009 and sadly lost her battle with Ovarian Cancer in 2017. Prior to us having our 3 kids and understanding parenthood, Arja asked if she could leave work for a few hours to watch her son run cross-country at school? Back then our business was young, we were focused on the financial cost and didn't understand the importance of work-life balance. This was until she returned to the office, beaming from the inside out at her son's achievement! One of our core business values is that 'family events come first'. This has given Tim and I as business owners permission to watch our kids over the years, but most importantly, our team are equally able to do the same.

Another foundational belief in our business that was inspired by Arja is: the standard you walk past, is the standard you accept. Arja never shied away from a hard conversation or correcting an issue. Like many, we are a human interaction business and sometimes, human errors can happen. We 100% own our mistakes, this means that if anything goes wrong, we speak up to find the best resolution. Everyone knows you are not going to be belittled or reprimanded, the focus is 100% on improving our process.



From the outset, we have always corrected people when that say, 'Oh such and such works for you guys!' No, 'such and such works WITH us not FOR us!' We are adults, working with adults, the reality is we would not have a successful business if we did not empower our work family. Our team mean the world to us, we innately believe in every single one of them, we appreciate their contribution and celebrate our success along the way with them, they are the reason we are successful. Yes, admittedly, it took Tim some time to give our talented team the autonomy to make decisions and loosen the 'control freakiness' that goes along with business ownership.



Nowadays our team are the life and soul of our business, helping over 5,000 Kiwis across New Zealand get better financial outcomes. There's a saying, 'If you want to go fast, go alone, if you want to go far, go together' and that's us in a nutshell.

You would not believe the number of podcasts and content I consume. It seems that 'big businesses' want to act small, to be personal, have close knit teams, be value driven and able to react quickly to whatever market they operate in. If you stripped away all our 'work' achievements, such as, how much money we've made people in their investment portfolios or the insurance claims we've facilitated to get paid in the worst of circumstances for people, my gut feeling is, our work family would say – 'they are proud to be a part of RIVAL Wealth. It's more than just turning up to work, it's the community spirit at heart and genuine desire to help people that counts.'

Carissa Fairbrother is a Financial Adviser at RIVAL Wealth. This information is of a general nature and is not intended as personalised financial advice. RIVAL Wealth is a Financial Advice Provider (FAP) licenced by the Financial Markets Authority to provide financial advice. Our disclosure document is located at rivalwealth.co.nz or a written copy is available on request.