



Adviser Declaration

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My experience

I am a Financial Adviser (FA) under RIVAL Wealth's Financial Advice Provider Licence through the Financial Markets Authority and a member of Financial Advice New Zealand. My expertise is in providing advice on cash management, debt management, ACC, personal risk management and estate planning information. I am an employee of RIVAL Wealth Ltd, a specialist financial advice company that aims to provide solutions for you to make an informed decision about your financial situation.

Supported by the dedicated team at RIVAL Wealth, I work closely with you to understand what matters most to you, identify your financial needs, and make practical recommendations so you can confidently reach your goals.

Born and raised in South Africa, I spent my twenties living in the Middle East and England with my family before returning to South Africa. I qualified as a Financial Adviser in 2013 and built strong, long-term relationships with clients in the Cape Town region, becoming a trusted partner on their financial journeys. In 2023, we relocated to New Zealand and now call Auckland home.

Outside of work, I enjoy staying active and spending quality time with my family while exploring New Zealand's beautiful beaches, regional parks, and natural surroundings.

My relevant qualifications and business awards

I have completed a Post Graduate Diploma in Financial Planning at Stellenbosch University, South Africa; an Associate of Applied Science in Business from Columbia Southern University, USA; and the New Zealand Certificate in Financial Services Level 5 in risk insurance (with the investment strand in progress). I am proud of the business awards we have received and love being a part of the success.



Te Taura Here Tohu Mātauranga o Aotearoa
New Zealand Qualifications & Credentials Framework



I keep my knowledge and competence up-to-date through continuing education (consisting of seminars, technical briefings, product accreditation and conference workshops). This includes keeping up-to-date with changes to the Code of Professional Conduct for Financial Advisers and relevant consumer laws such as the Fair Trading Act.

Services we provide

I provide advice in the following subject areas:

Area	General information
Comprehensive Financial Planning	Full analysis of your situation aligned with your financial objectives.
Cash and Debt Management	Providing personal advice on budgeting, debt restructuring and establishing sufficient cash reserves.
Risk Management	Protecting personal risk and ensuring sufficient cash is available in the event of disability, illness or death.

I cannot give advice on the following but can refer you to an expert within our business:

Area	General information
Investment and Retirement Planning	Considering risk profile, investment timeframes and cash flow needs, recommending appropriate solutions to you. <i>Referred to an investment expert within our business.</i>
General Insurance	Protecting your possessions and actions against unforeseen loss or damage. <i>Referred to a general insurance expert within our business.</i>

How I operate

If you engage in personalised advice, my services will take into account your personal objectives, financial situation and needs. It will be clear and concise and provide you with sufficient information to make an informed decision. This process can require a series of meetings with you before our advice is finalised. The services I provide will depend on your needs, and may include any or all of those detailed in this document.

I am a member of Financial Advice New Zealand and adhere to their Code of Ethics and Practice Standards in all facets of our business.



How I give advice

When I give personalised financial advice I follow the internationally recognised process:



Code of conduct

When I give personalised financial advice I adhere to these 5 standards:

1. Treat clients fairly
2. Give financial advice that is suitable
3. Act with integrity
4. Protect client information
5. Ensure that the client understands the financial advice

Ongoing service and claims

We will contact you annually and offer to review your financial situation to ensure your plan is still suitable for your circumstances and objectives. Because personal circumstances change over time, we offer this ongoing review service, so your investments and insurance can be updated to suit you and your family. We have specialised people to deal with claims in risk insurance and general insurance. We also offer a proactive service for claims, for help with submitting your claim, should you need it.