



Media Release

For immediate release

17 October 2024

Select reaches \$1bn

Following our highly successful annual Select Adviser Summit in Queenstown, where top advisers gathered to hear from Stephen Joyce and other interesting speakers, Select Wealth Management is proud to announce that it has passed \$1bn.

Head of Select Wealth Debbie Tuddenham says that Select Wealth's goal is to support advisers in managing client portfolios.

"We're particularly pleased that as we've grown, we've been able to maintain our strong service offering to advisers and their clients. We're very proud of the excellent service that our whole team provide, and we often get feedback that the service we provide is one of the reasons advisers like to deal with Select.

We're very focused on making sure that this strong emphasis on service continues as we grow further with advisers from here. "

Since gaining a DIMS licence in 2015, Select Wealth has strived to provide financial advisers with a range of services to support their businesses and provide great outcomes for clients.

Select Wealth has been very focused on supporting financial advisers as we know the importance of everyday New Zealanders being able to access high quality advice. "

As well as offering an improved range of model portfolios, Select Wealth has extended its range of available investments. Financial advisers who want to create a bespoke portfolio for their clients have a range of options including a selection of managed funds supported by underlying research, a range of index ETFs, direct NZX and ASX stocks and a variety of direct bonds and fixed interest options.

The Select Service is available on the Apex Investment Administration (NZ) and FNZ wealth platforms.

“As it’s our goal to make it easy to provide advice and manage client portfolios, we have developed a range of online tools that allow financial advisers to understand a client’s risk profile, undertake a needs analysis and project a client’s future wealth, based on their individual position,” Tuddenham notes.

“This has also allowed us to direct all of the client’s information into an online application which can be used as part of the advice process or as a stand-alone application form, and can be electronically signed by the client, so it really is making the advice process streamlined and easy. ”

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