

Questions to make you think...

- How do you feel about passing assets on to your heirs?
Is it important to you to leave a legacy? For some people its not and that's fine!
But we ask the question!
- What does financial independence mean for you?
Is it about having millions or simply being able to have a holiday without worrying about how to pay for it?
- What is your first memory about money?
Have you ever stopped to think about that?
Pocket money, delivering papers after school?
- What decisions are you making today which will be looked upon as outstanding in the future?
Hindsight is great but how is the foresight?
- What are some of the best financial decisions you have made in the past?
You've made it this far, you've made some good decisions already. Are you ready to make some more financial decisions or are you a bit nervous?

These are just a snapshot of some of the questions we might ask you when we get together for a coffee. After all it's not about which box you tick, but why you even need one!

Some of the areas we work with our clients are:

- Financial planning:
Making sure there is a plan for making money work
- Advice and coaching:
Support and encouragement to get things done well
- Insurance
Making sure the t's are crossed and the i's are dotted
- Investing:
Saving for a rainy or even a sunny day
- Retirement savings:
But at what age 65yrs... 40yrs..?
- Workplace saving and Kiwisaver:
Making the most of your biggest asset - your income!
- Home loans and commercial lending:
Helping find the best solution for your needs when you need it!

"More than just money - but you've got to start somewhere and money helps!"

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A disclosure statement is available on request and free of charge

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Exclusive provider of JMap

Jmap[®]
Financial Journey Map

Are you wanting to work with someone who takes the time to understand your background, gives alternatives and sound advice that all makes sense?

Vault Financial Group clients have that all the time. In fact they can even choose how they are looked after. We know people have different goals, different needs and different desires. We also understand that "time" is a resource that many of us don't quite have enough of.

We actually want to know about you, your family and what makes you, 'you'. Because it makes up the person you are and helps form your attitude to money and finance.

At Vault, we provide our clients with timely sound advice and support right when it's needed. It could be simply like the time a client arrived one evening at the airport realising that he had no travel cover. A phone call later - all sorted. Or more comprehensively an entire financial "sort out" where we tackled a whole bundle of issues that just hadn't been attended to.

Here's another reason we're different. Often we are "central" to getting things sorted, by you, by us or importantly by other professional advisers. It may be just a matter of getting you moving and supporting you in that.

Bit like a coach really.

Introducing Jmap[®] - the personalised programme designed by Vault that makes us different and helps you be more successful!

At Vault, our goal is to always work in the best way for our clients. We have been doing this for a number of years now and after consultation with many of our clients we have created Jmap[®] - a completely personalised programme that allows you to get the very best from your financial future.

Jmap[®] 1. Get something sorted

Something has changed in your life and you need to get it sorted. We meet to discuss your needs, your thoughts on money and review your financial situation. We then we put together the necessary details and proposed solution for you.

Jmap[®] 2. You know a number of things need attention

The financial areas of your life can be quite complicated. You don't have time to worry about the small detail but you want to know you are secure. Working with you to help ensure your financial goals are on track, is your financial coach. We spend the time with you at the beginning to ensure that all of the details are taken care of. We check in with you every now and then to help ensure everything is working for you as it should financially.

Jmap[®] 3. It's not the destination... its 'the Journey' right?

It's not the destination it's the journey - you know that already, that's why you are successful. When it comes to 'money', knowing you have the support, backup and accountability that a financial coach can provide, means we will help you reach your financial goals sooner and with less stress than ever before.

Your personal financial coach works with you on a regular basis, helping ensure your financial future is sound, secure and able to give you what you want, when you want it and how you want it.

Find out which Jmap[®] is for you by simply calling a **Vault Financial Group Coach** right now!

real aspirations
true experiences