

For Advisers

Benefits to your clients

Our easy-to-use, smart interface is designed specifically for retail customers, and allows clients to see all their investments with Amova in one place. Other benefits of using GoalsGetter for your clients include:

- A fully digital & transparent investing experience
- No platform fees
- The ability to set up and manage multiple goals and investments in one place
- An embedded projection tool that is intuitive and easy-to-access
- 24x7 access to track balances, transactions and performance
- Functionality to provide investors with the ability to establish regular savings (minimum payment \$20)

Benefits to you

GoalsGetter automates and streamlines the operational side of your business, so you can spend more time with clients and growing your business. Other benefits of GoalsGetter for advisers include:

- Adviser controlled client onboarding digitally via the Adviser Dashboard
- Secure access to all your GoalsGetter clients' investments via the Adviser Portal
- Assistant access available to help onboard clients
- Retail investment Scheme, comprising of diversified and single sector funds managed by Amova, available for individual and joint investors
- Create tailored KiwiSaver portfolios for your clients on our easy-to-use online platform, leveraging a curated selection of high quality funds
- Dedicated adviser support team available to assist with any questions
- An intuitive and user-friendly investment tool to help grow your clients' wealth



Scan the QR code to find out how GoalsGetter works

goalsgetter.co.nz/financial-advisers



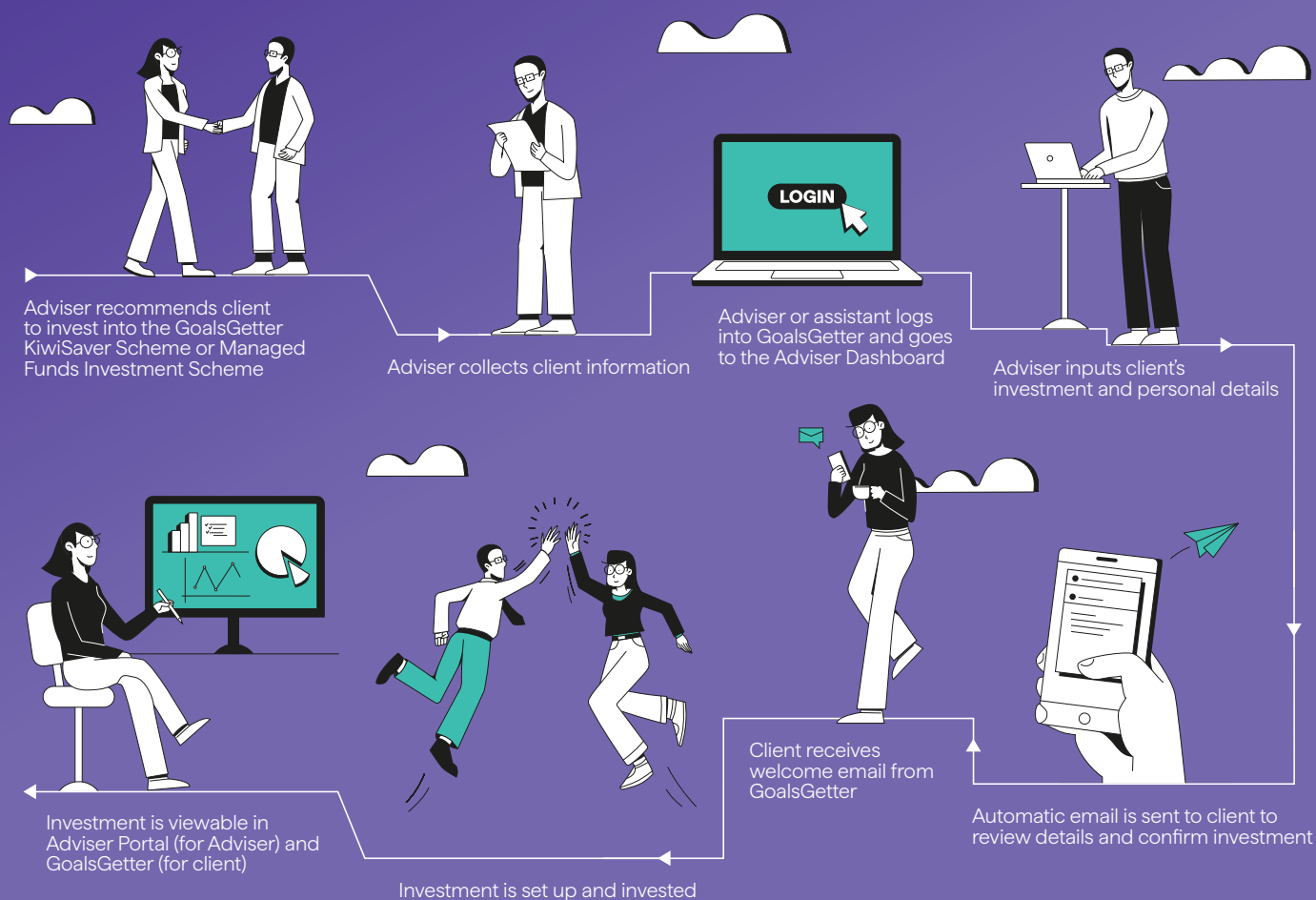
Set / track / achieve

GoalsGetter is a great tool to use with your clients to help them set, track + achieve their wealth goals under your guidance.

GoalsGetter enables advisers to diversify their clients' investments in a simple and cost effective way. Whether you're leveraging the full suite of Amova investment funds or unlocking choice with the GoalsGetter KiwiSaver Scheme, you have the ability to deliver tailored solutions for your clients.

Onboarding

Process of onboarding a client



GoalsGetter for Advisers Team

Distribution Team

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Note: Your Trust clients can also invest with Amova via manual application forms found in the GoalsGetter for Advisers Help Centre

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