KiwiSaver

goalsgetter

Adviser User Guide

Your guide to setting up client investments in GoalsGetter.

Issued by Amova Asset Management
New Zealand Limited

goalsgetter

by amova Asset Management

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
- 24×7 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
- Managed Funds 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

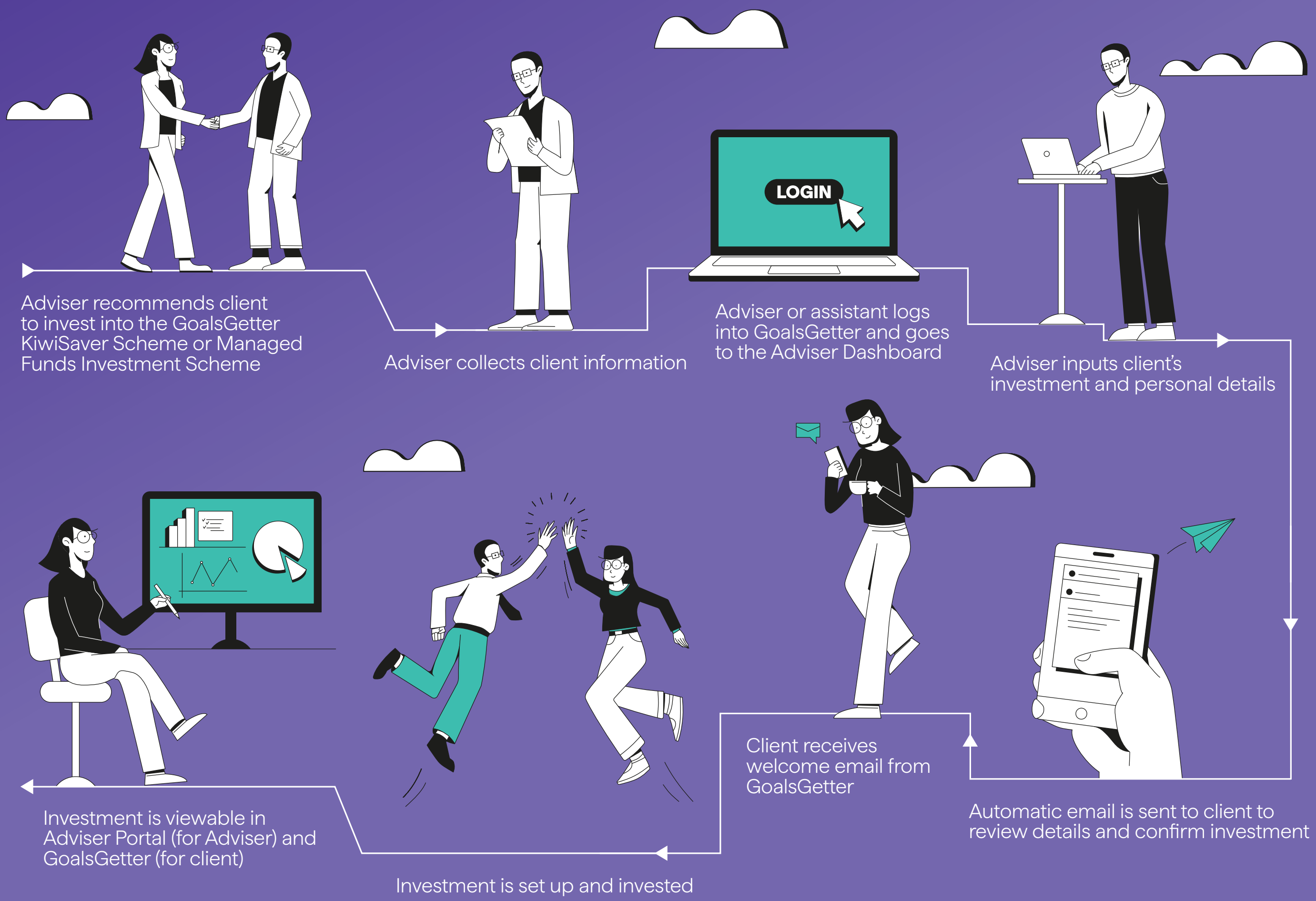
GoalsGetter is a great tool to use with your clients to help them set, track + achieve their wealth goals under your guidance.

GoalsGetter enables you to diversify your 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.

goalsgetter by amova Asset Management

Onboarding

Process of onboarding a client



GoalsGetter for Advisers Team

Distribution Team
nzdistribution@amova-am.com / 09 307 6364

Customer Support Team
support@goalsgetter.co.nz / 0800 303 308

goalsgetter.co.nz/financial-advisers

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

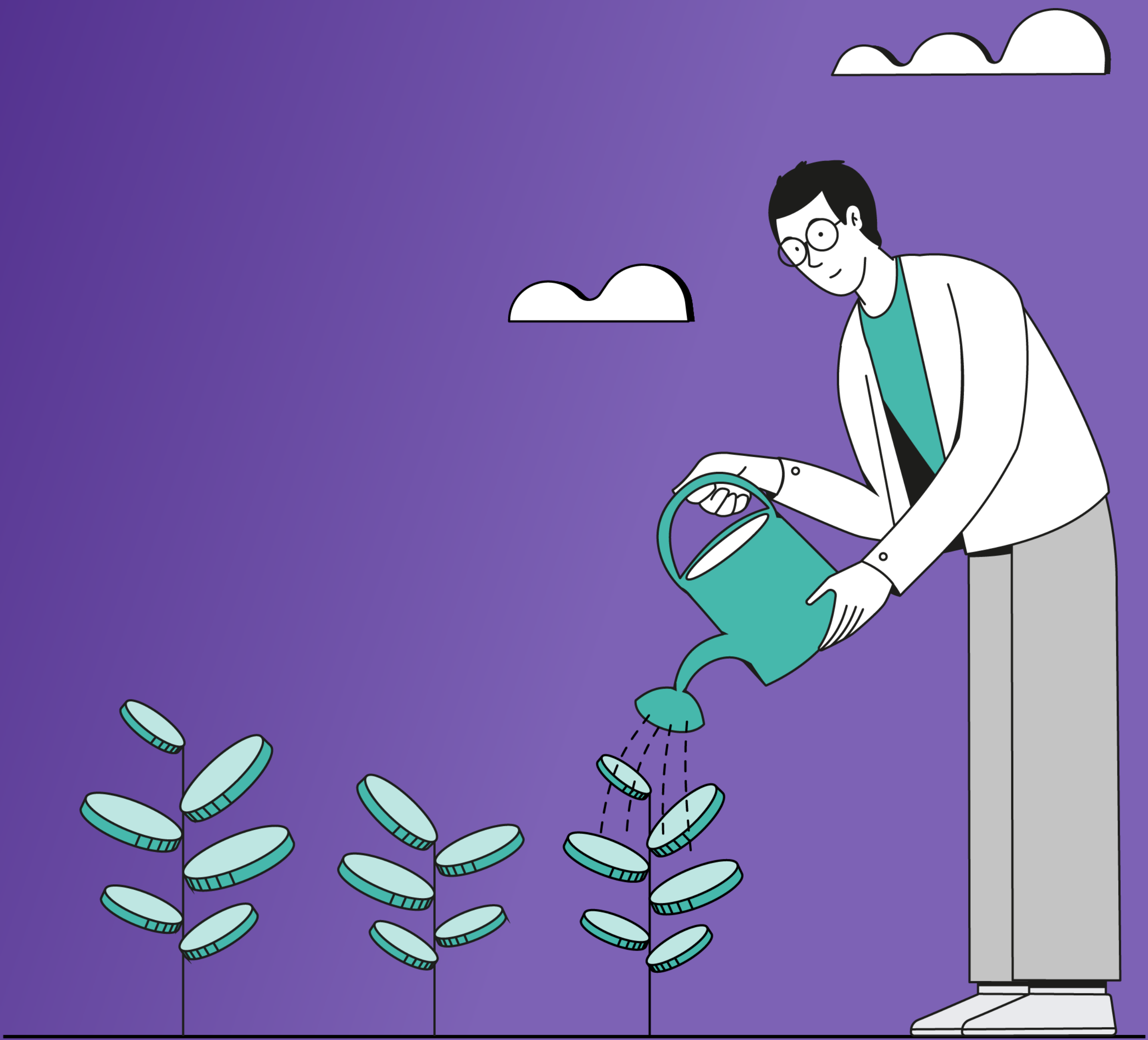
goalsgetter amova Asset Management

Contents

KiwiSaver

goalsgetter

Setting up a client: KiwiSaver Transfer

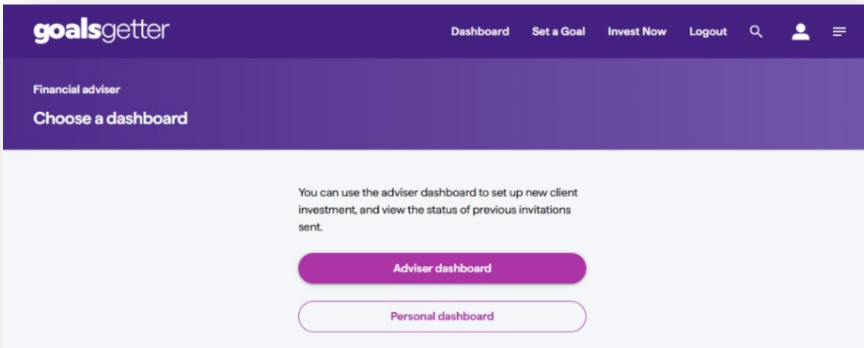


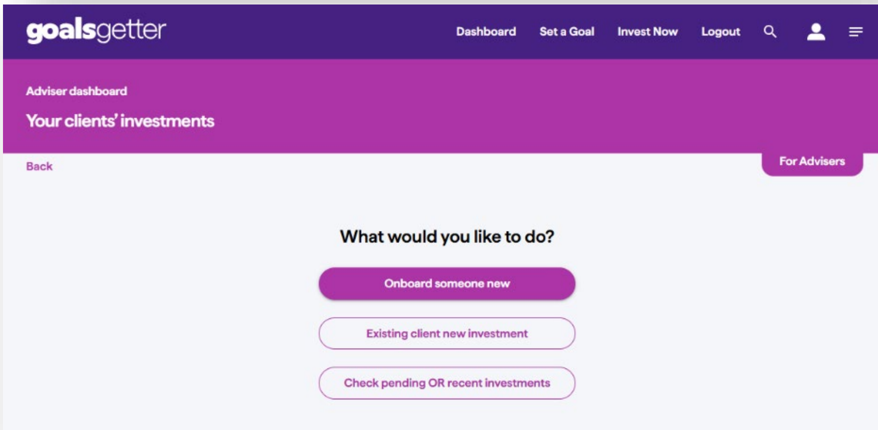
1. Setting up a client: KiwiSaver Transfer

Adviser Steps

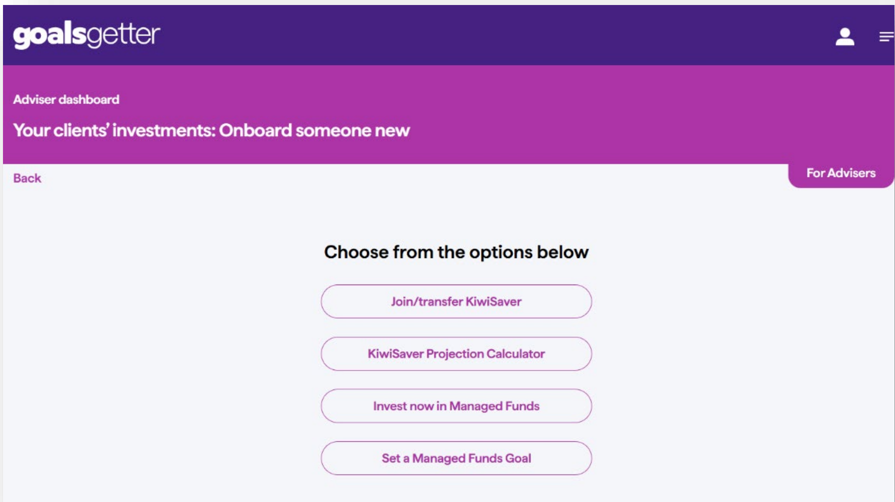
1. Visit www.goalsgetter.co.nz and login with your personal credentials.

   Select Adviser dashboard and then 'Onboard someone new'.

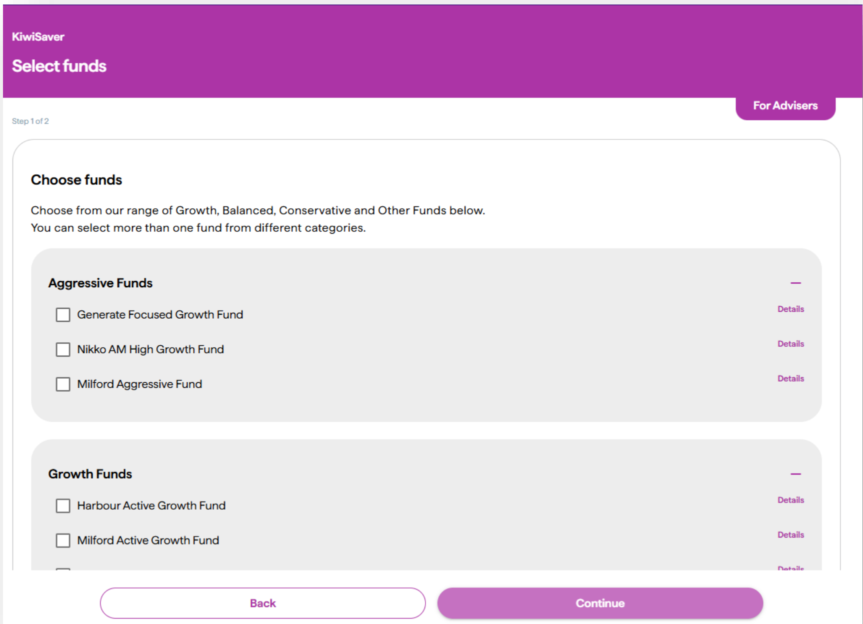




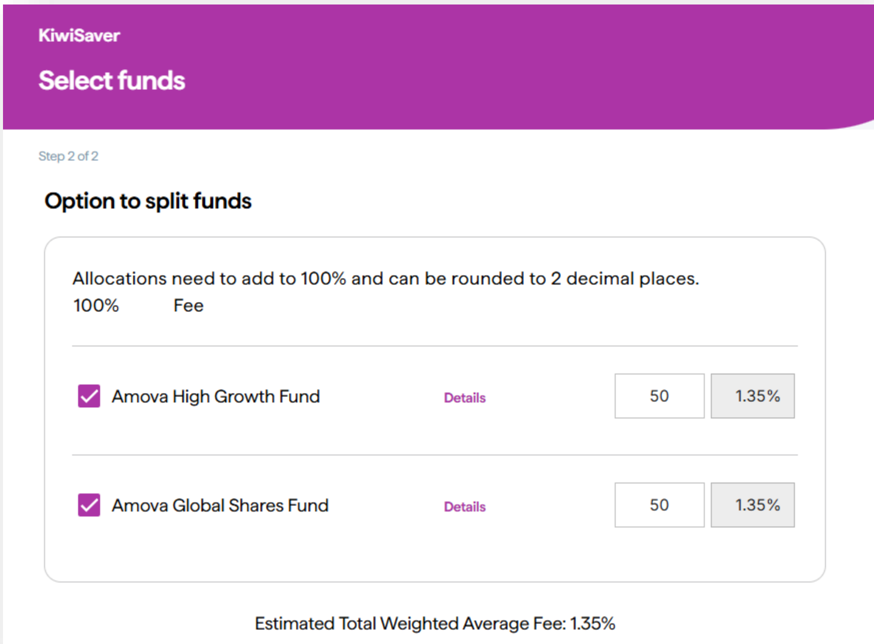
2. To join or transfer your client's KiwiSaver investment to the GoalsGetter KiwiSaver Scheme tap or click on the 'Join/transfer KiwiSaver' button.



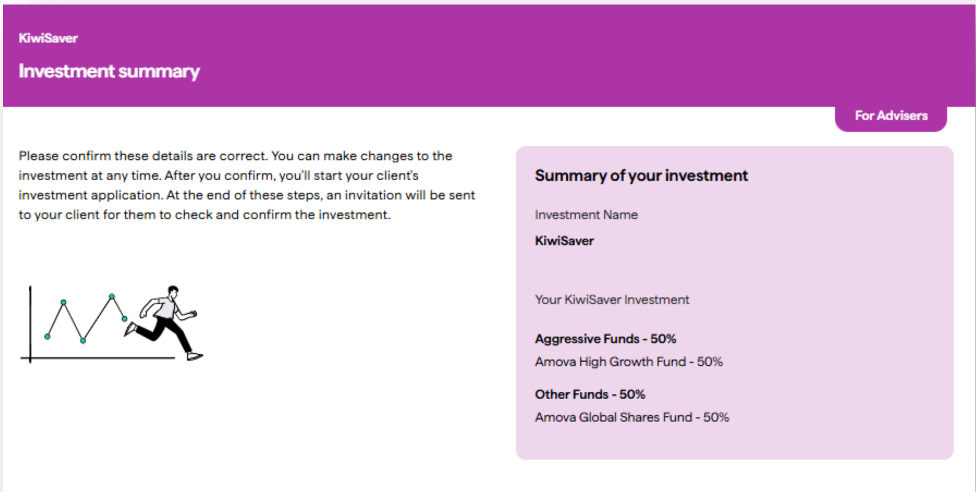
3. Select Funds: Choose from our range of Diversified Funds and Single Sector Funds below. You can select more than one fund from different categories.



4. Option to split funds. Allocations need to add to 100% and can be rounded to 2 decimal places.



5. Investment Summary: Please confirm the details displayed are correct before clicking Confirm.

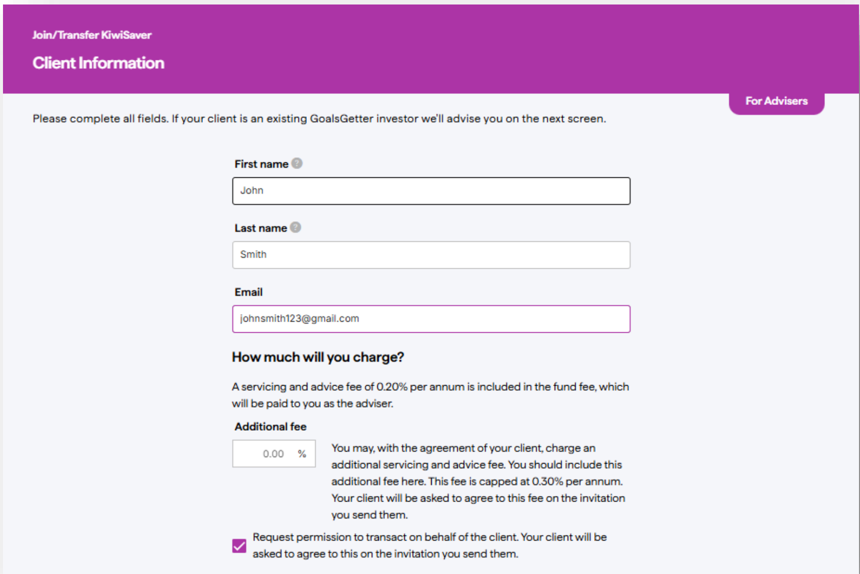


6. Individual client details: General

You will need to state if you will charge your client any additional fees. A servicing and advice fee of 0.20% per annum is included in the fund fee, which will be paid to you as the adviser.

You may, with the agreement of our client, charge an additional servicing and advice fee which is capped at 0.30% per annum.

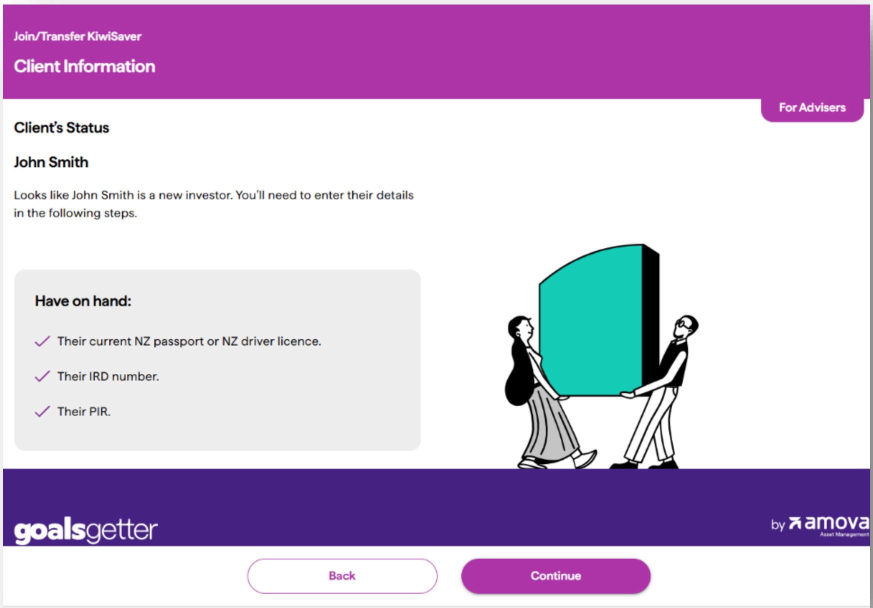
If you do not wish to charge any additional fees, type 0 in the additional fee box before tapping continue.



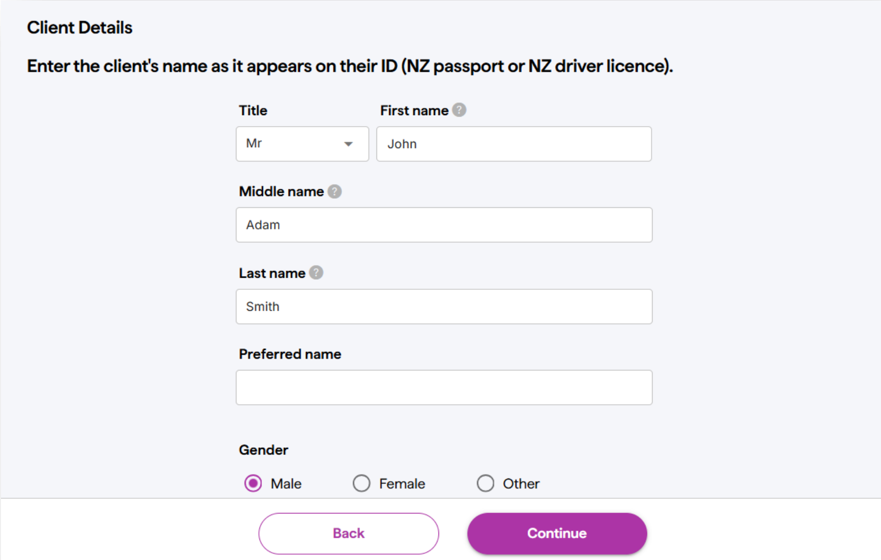
7. If your client is a new investor, you will need to enter their details in the following steps.

Please have the following on hand:

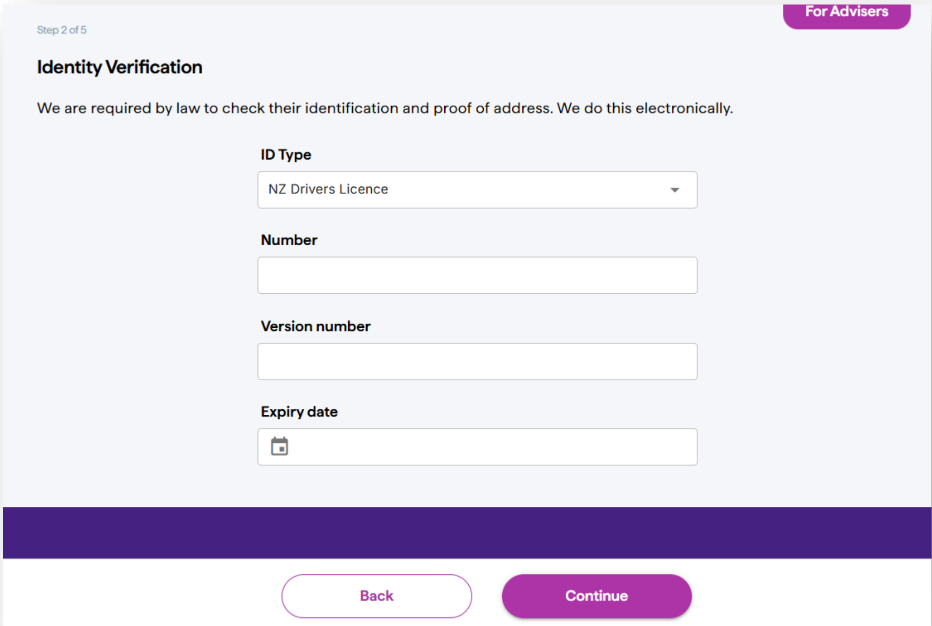
- Their NZ passport or drivers licence number
- Their IRD number
- Their PIR number



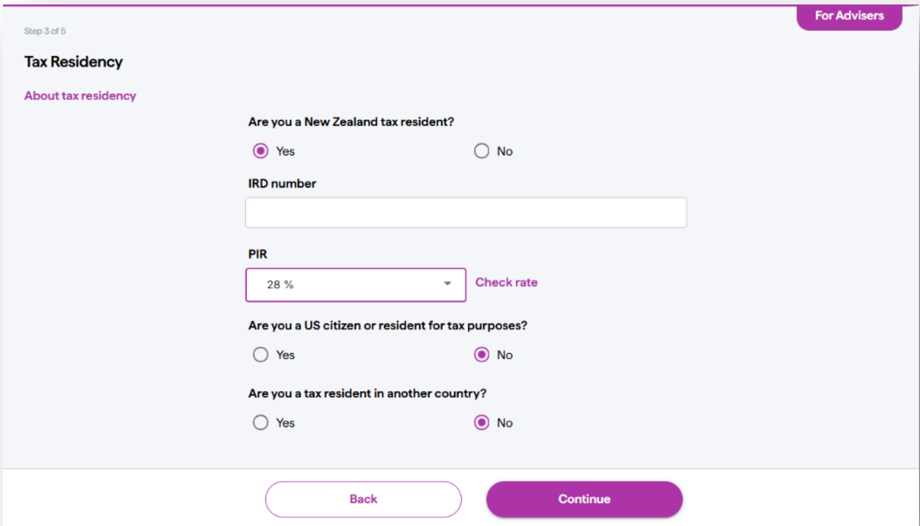
8. Enter the clients name as it appears on their ID.



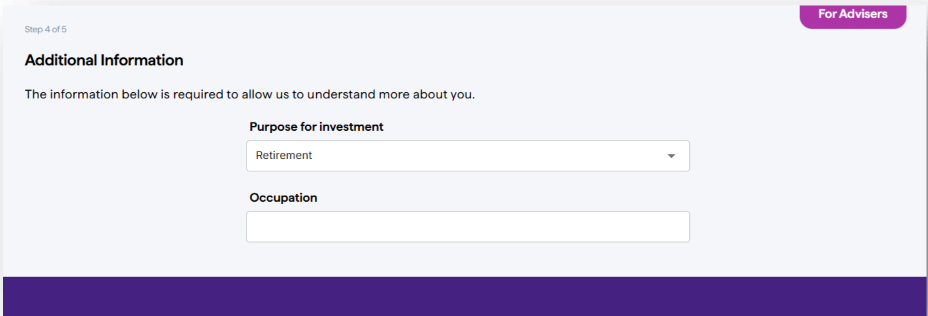
9. We are required by law to check your client's identification.



10. Client details – Tax.



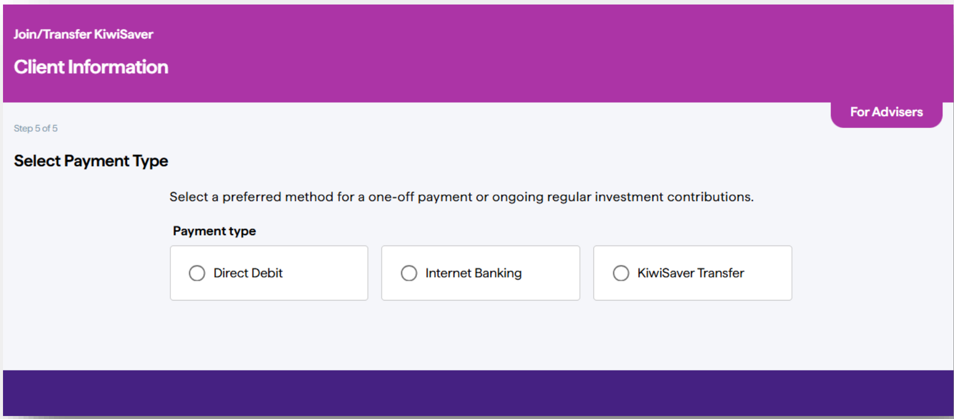
11. Please select the Purpose of Investment and occupation.



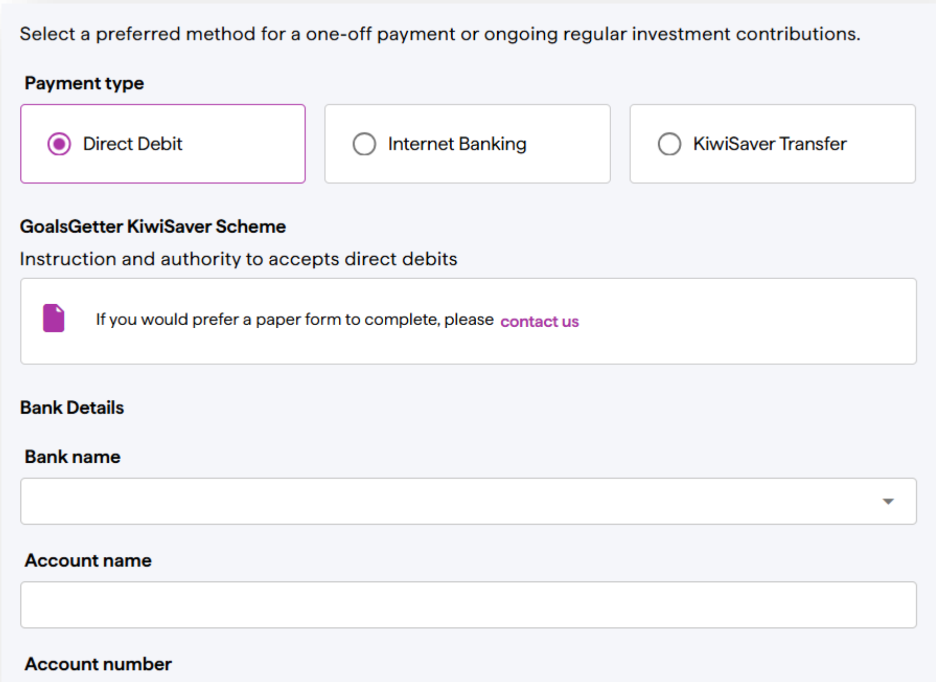
12. Please tell us the preferred method of payment for your clients ongoing regular investment contributions.

Internet banking or direct debit.

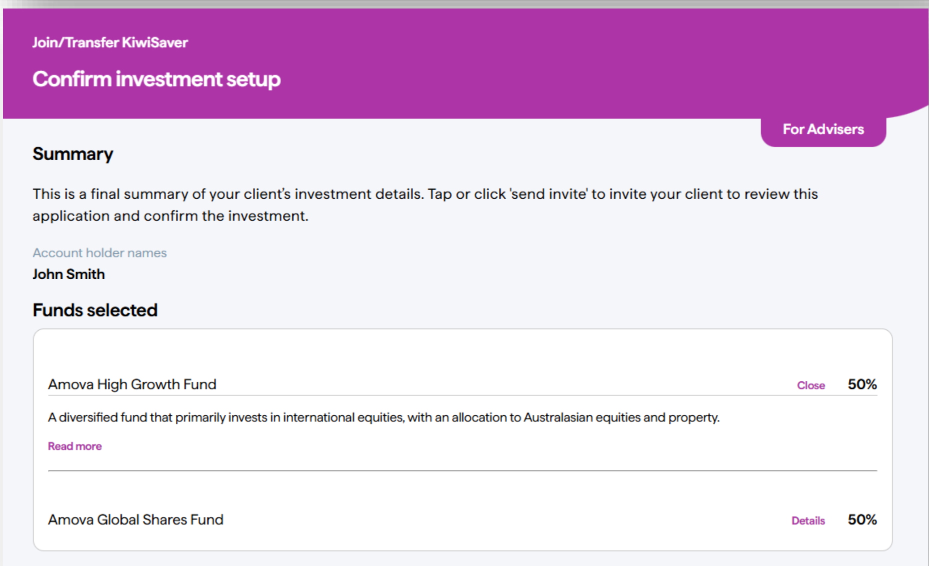
This will only be asked if the client wishes to make regular contributions to their investment.



13. The direct debit can be set up on this screen. Once complete we will then send the request to your client's bank to get set up.

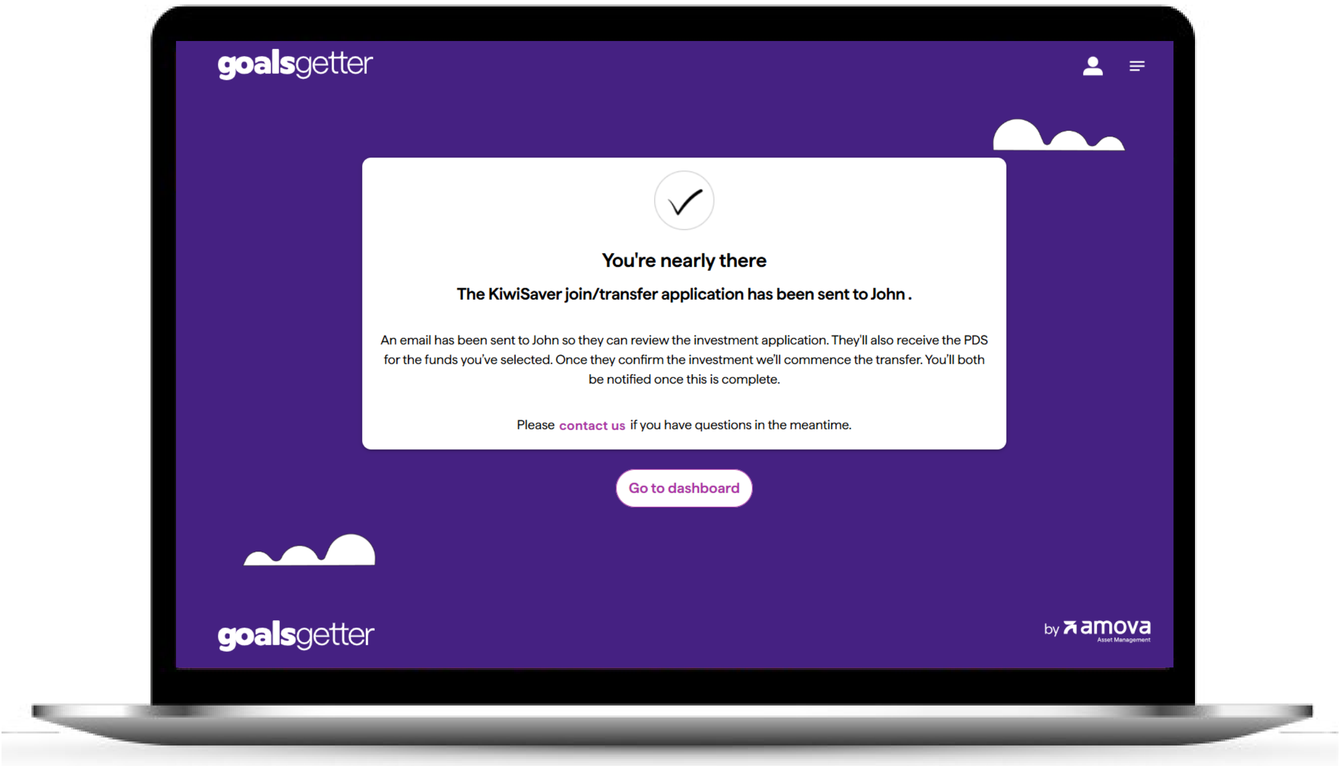


14. This is a final summary of your client's investment details. Tap or click 'send invite' to invite your client to review this application and confirm the investment.



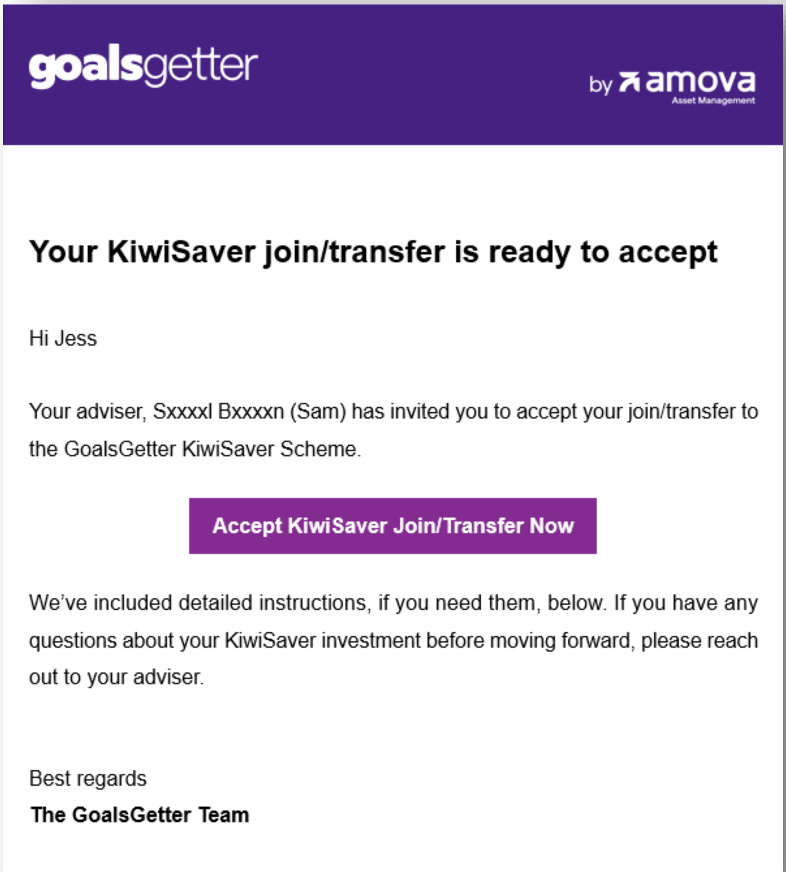
15. The investment application has been sent.

An email has been sent to your client so they can review the investment application. They will also receive the PDS for the funds you have selected. Once they confirm the investment you'll be notified about the next steps.



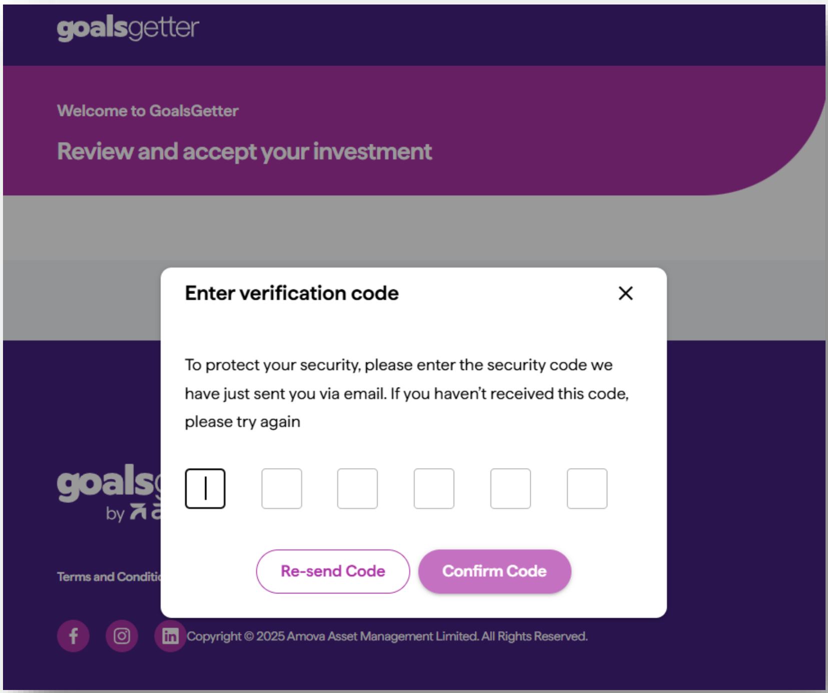
Client Steps

1. Receive invite, confirm set up by selecting the ‘Review Investment’ button within the email body copy. This will take you to GoalsGetter to review your details and accept your investment.



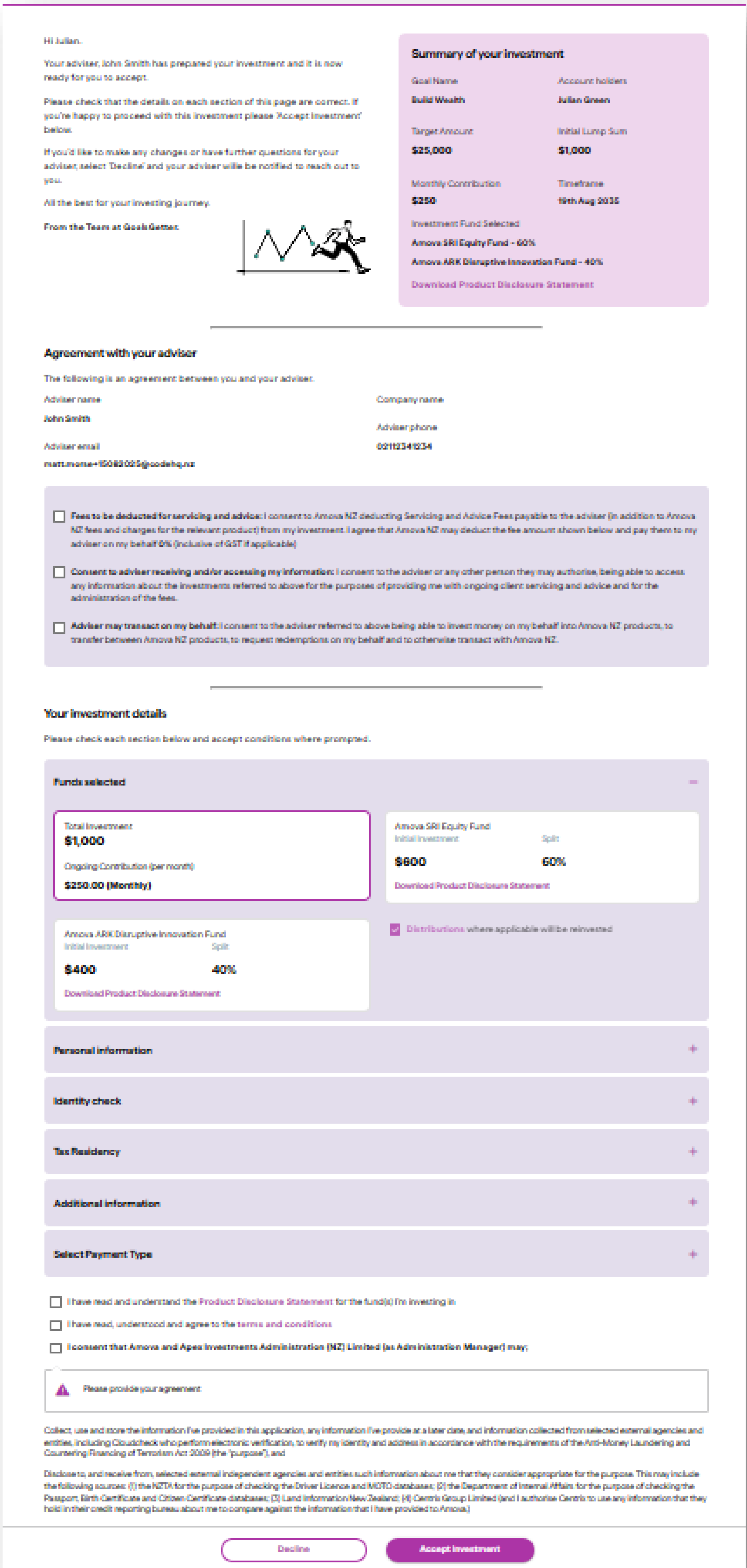
1. By clicking ‘Review Your Investment’, you will be redirected to the GoalsGetter app and be required to enter a 6-digit code.

   To receive this, tap the ‘Get Code’ button and then the code will also be emailed to your same address.



2. Next you will need to Review and accept your investment.

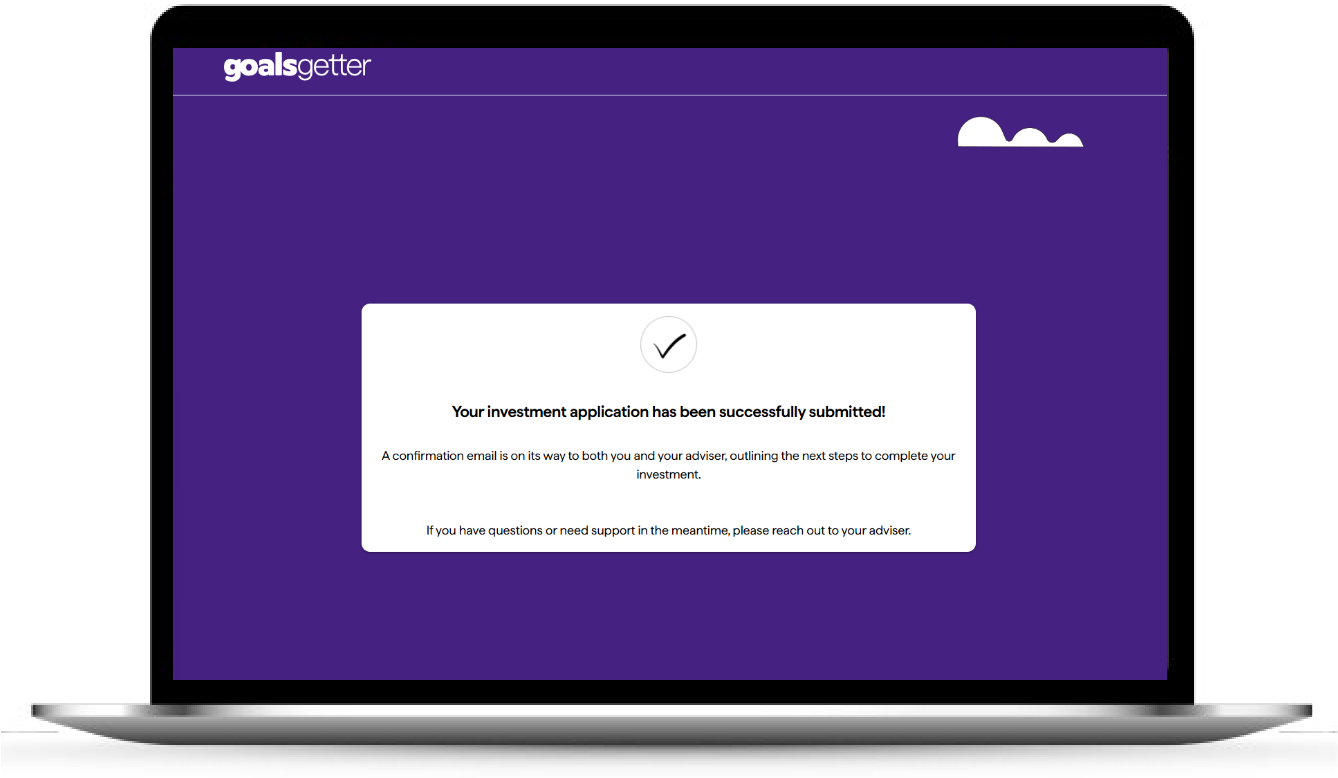
This includes checking the summary of your investment, your agreement with your adviser, and all investment details including your personal information were entered correctly by your adviser.



Do this by scrolling through and clicking the '+' button to review the entered details within each section. If any details are incorrect, you can edit them here.

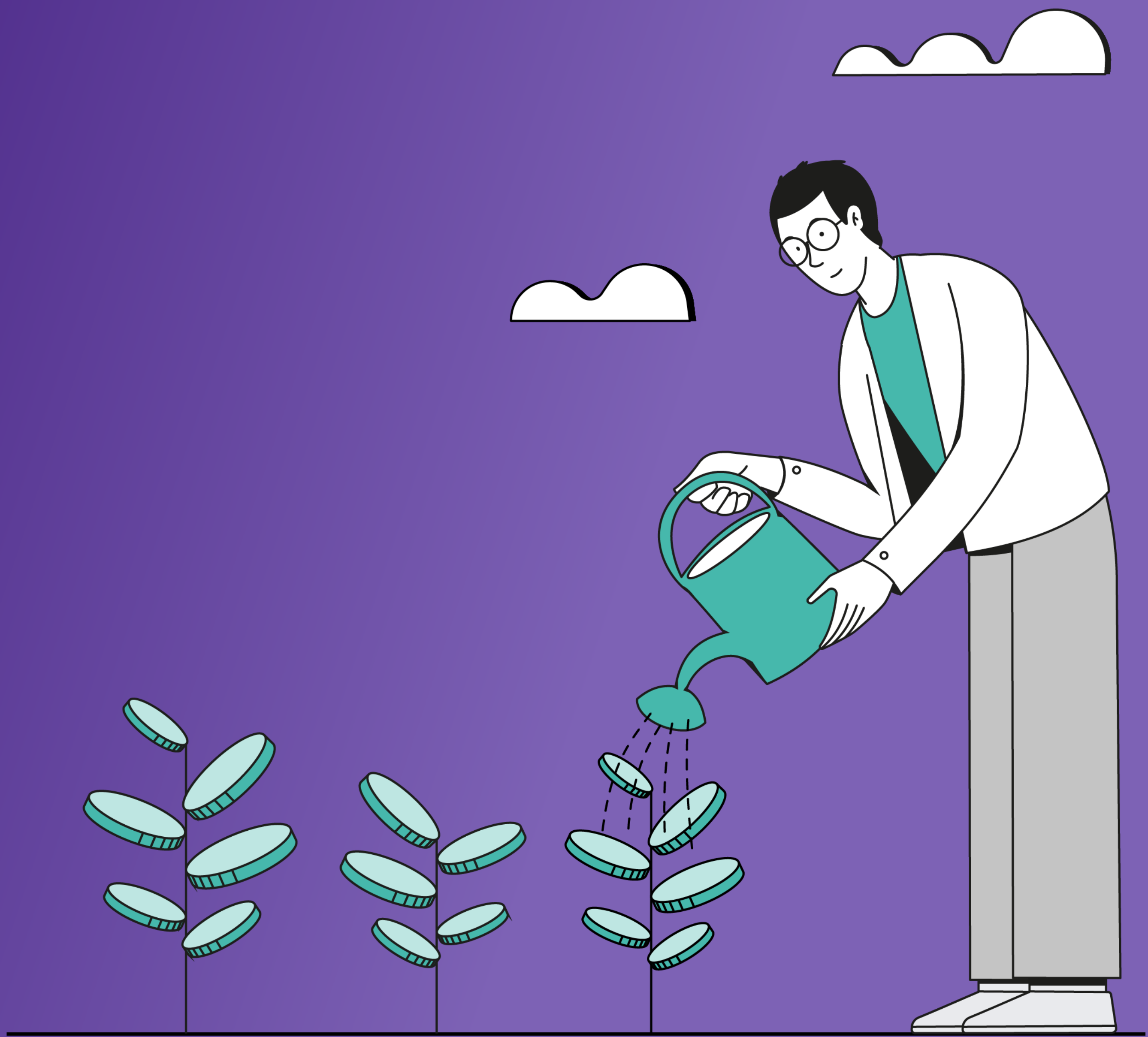
Once you have reviewed all the information and accepted everything required, click the 'Accept Investment' button.

3. Upon accepting, you will see a confirmation screen, and you will also receive a confirmation email that your investment application has gone through, along with next steps. Your adviser will also be notified.



KiwiSaver goalsgetter

Build a projection using the Projection Calculator

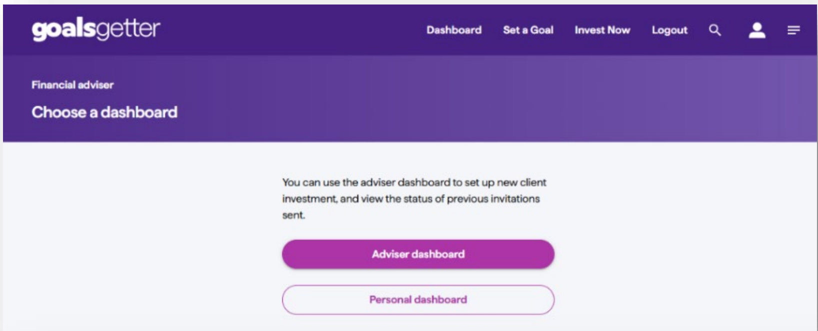


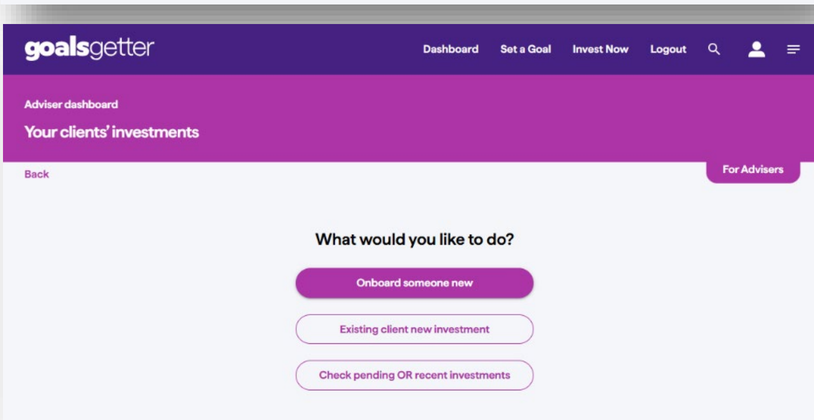
2. Build a projection using the Projection Calculator

Adviser Steps

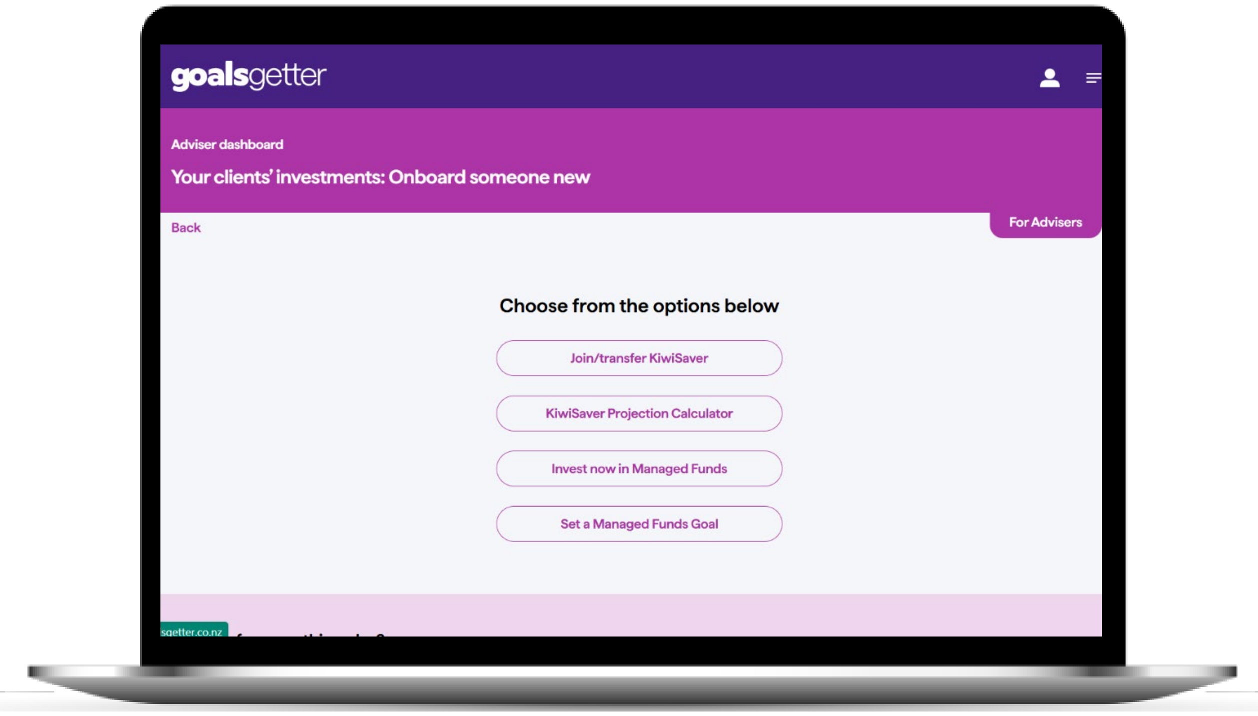
1. Visit www.goalsgetter.co.nz and login with your personal credentials.

   Select Adviser dashboard and then 'Onboard someone new'.



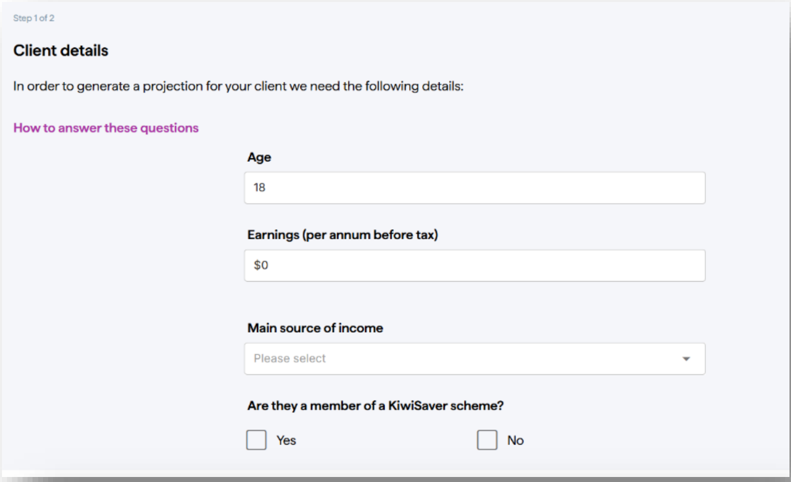


To show your client or build a projection of how their KiwiSaver investment could growth with different inputs by selecting 'KiwiSaver Projection Calculator'.

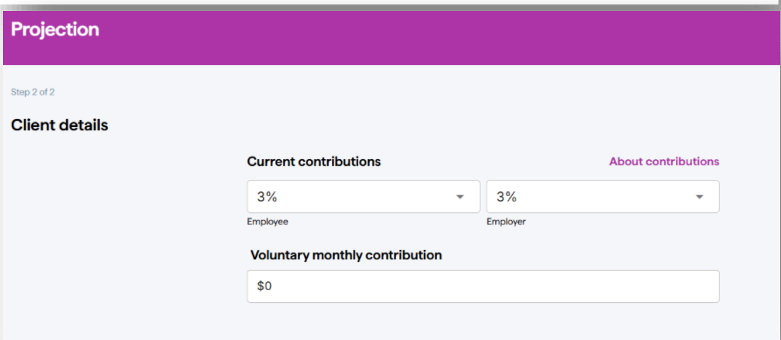


2. In order to generate a projection for your client we need the following details:

- Age
- Earnings
- Main source of income
- Whether they are a current KiwiSaver member



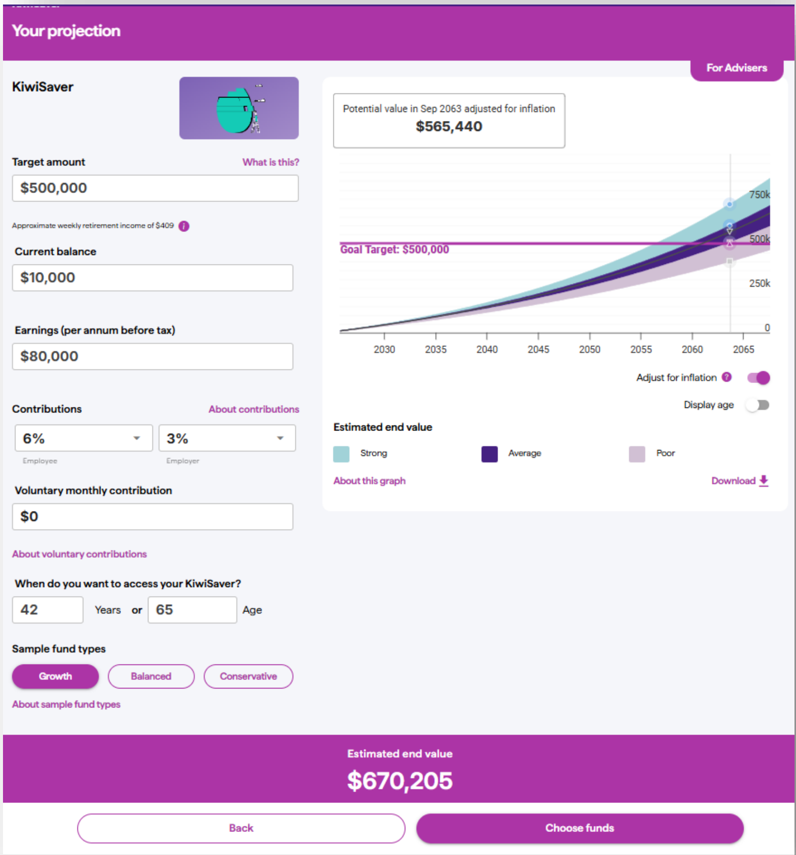
3. If they are a current KiwiSaver member, select their current contribution rate.



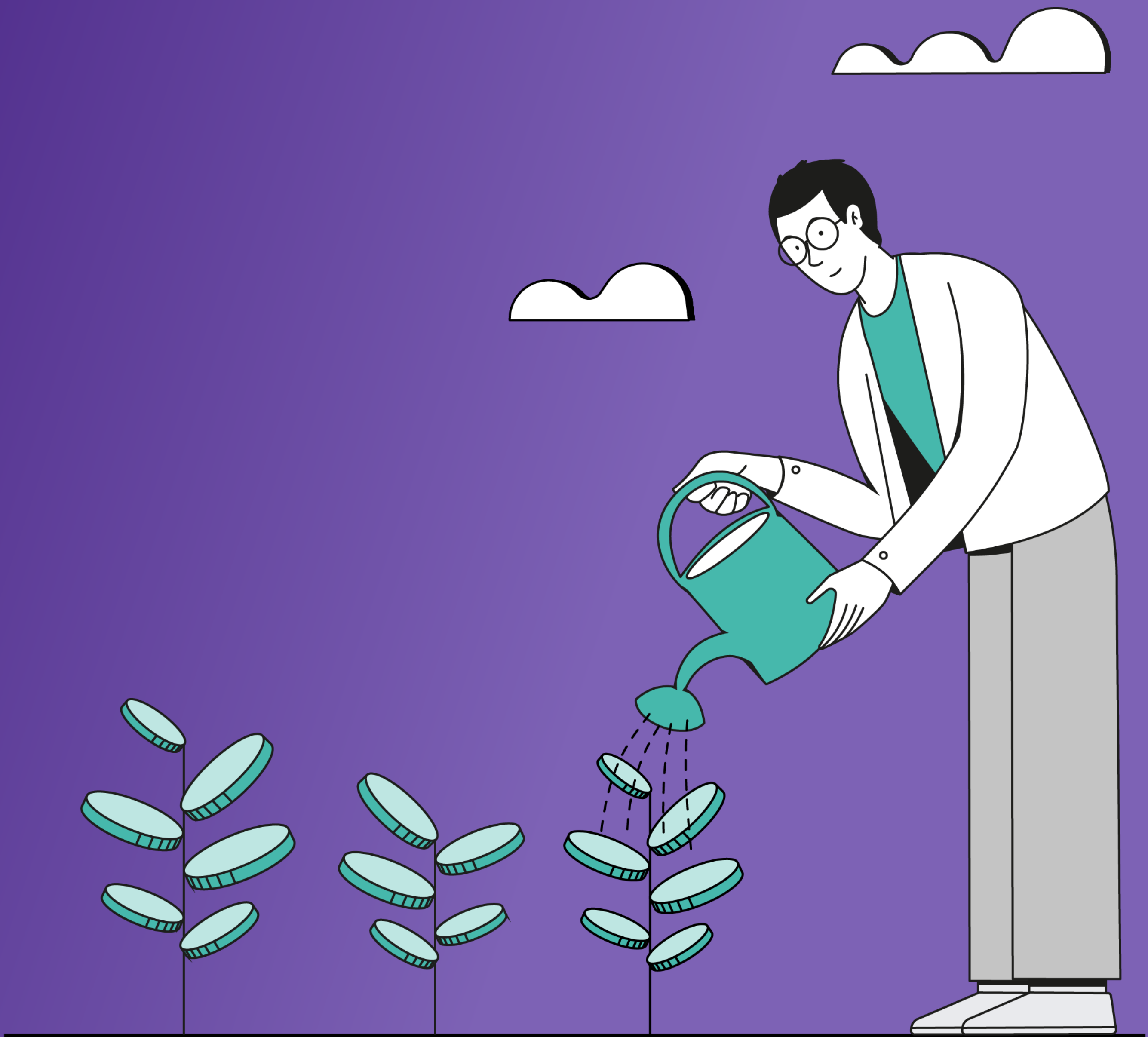
4. With those inputs you will be given an initial projection. You can adjust any of the inputs to create a more desirable retirement scenario.

Once you and your client have a scenario you are happy with, you can either:

- Tap the 'download' button to download the projection graph and data to use in preparing a Statement of Advice for your client
- You can tap or click 'Choose Funds' to proceed to joining or transferring your clients' KiwiSaver investment into the GoalsGetter KiwiSaver Scheme.



Setting up a client: Managed Funds



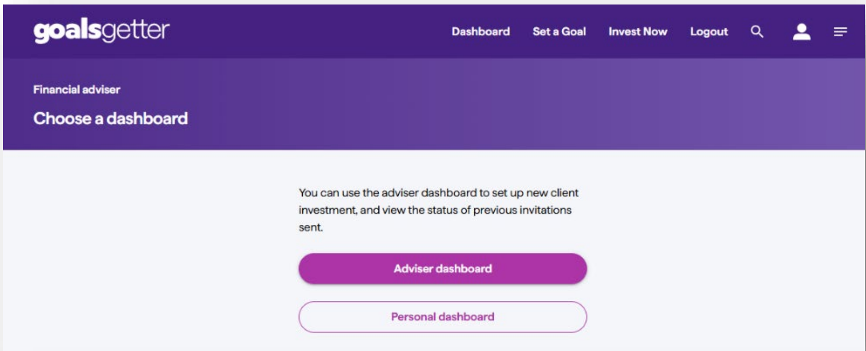
3. Setting up a client: Managed Funds

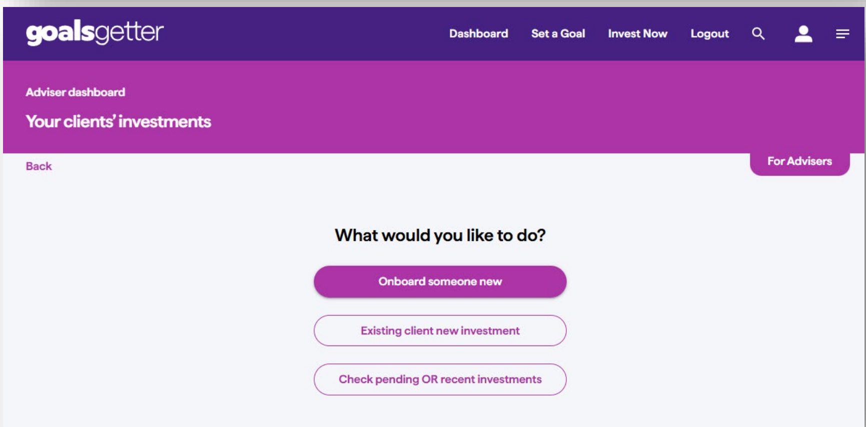
Adviser Steps

1. Visit www.goalsgetter.co.nz and login with your personal credentials.

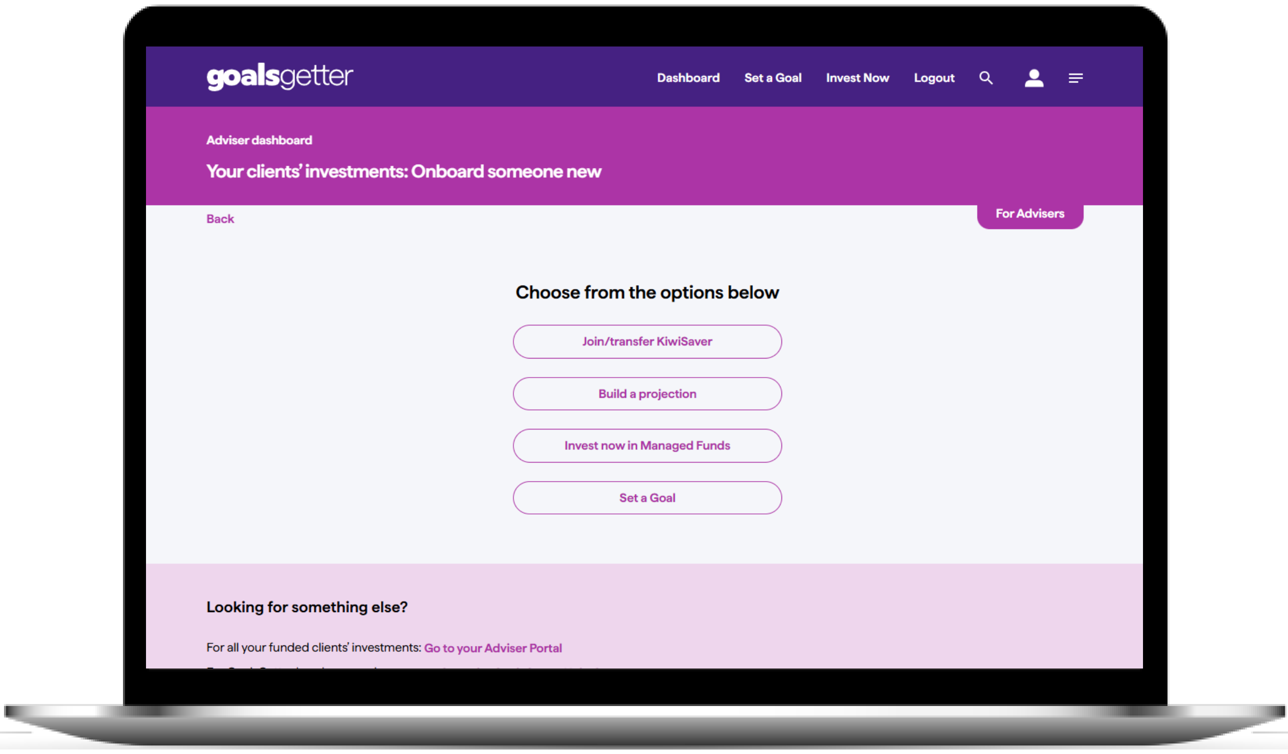
   Select Adviser dashboard and then click onboard someone new.

   The "Managed Funds" path is to set up an investment if your client has an amount of money they want to invest and you don't wish to set a goal for them.



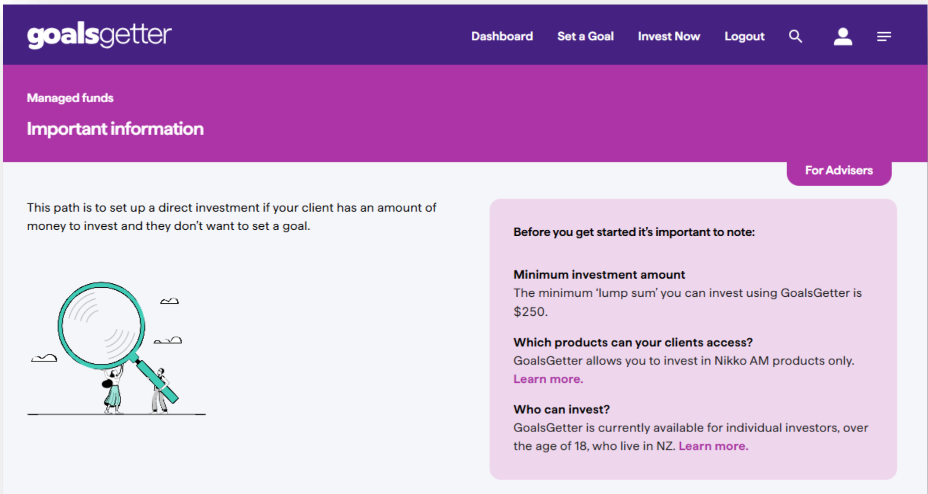


Please select 'Invest now in Managed Funds' here



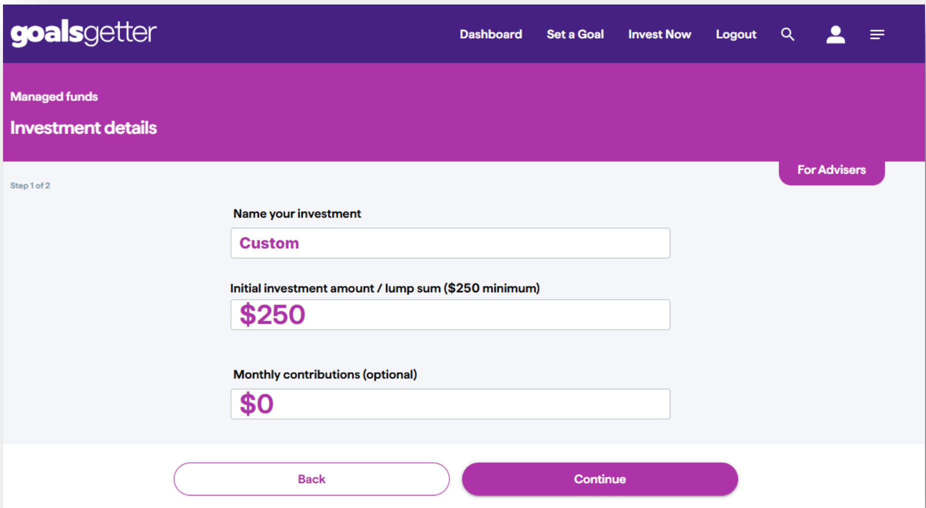
2. Before getting started, it's important to note:

- The minimum lump sum to invest is $250.
- GoalsGetter allows you to invest in Amova products only.
- GoalsGetter is currently available for investors over the age of 18 who live in NZ.



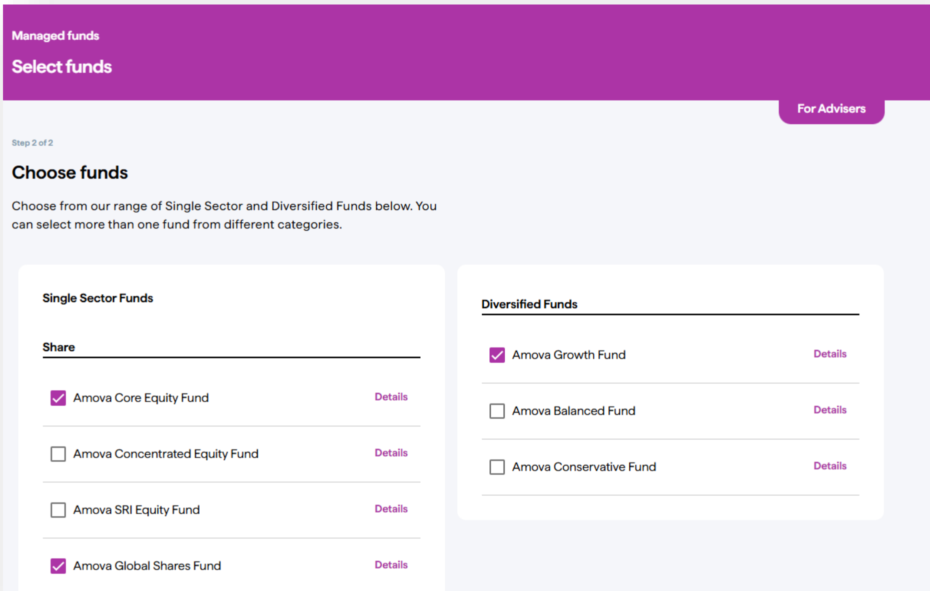
3. Investment details:

- Name of the investment, this will also appear on the clients dashboard
- Lump sum amount
- Ongoing contributions (optional)



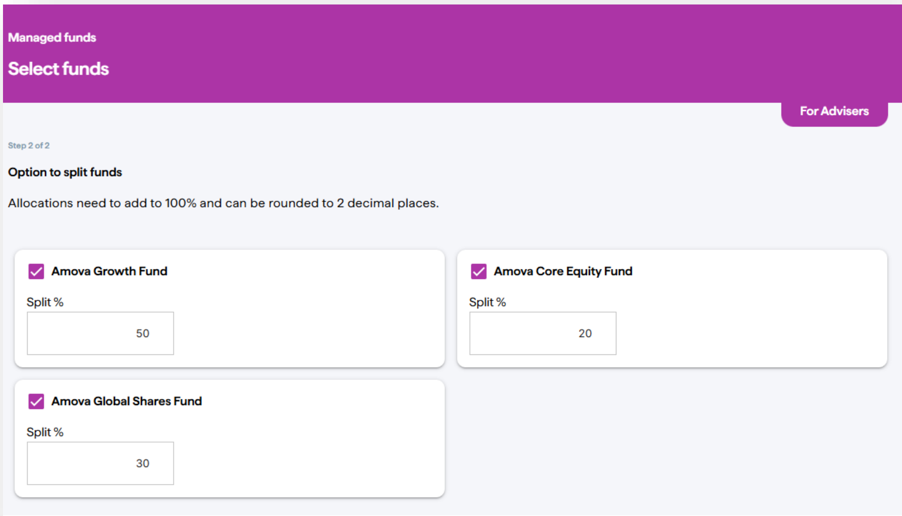
4. Select Funds

Choose from our range of Single Sector and Diversified Funds below. You can select more than one fund from different categories.



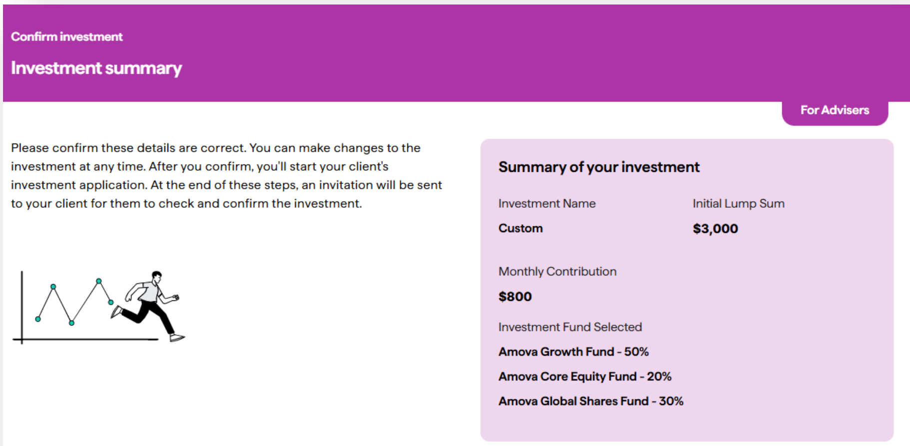
5. Option to split funds:

Allocations need to add to 100% and be rounded to 2 decimal places.



6. Investment Summary:

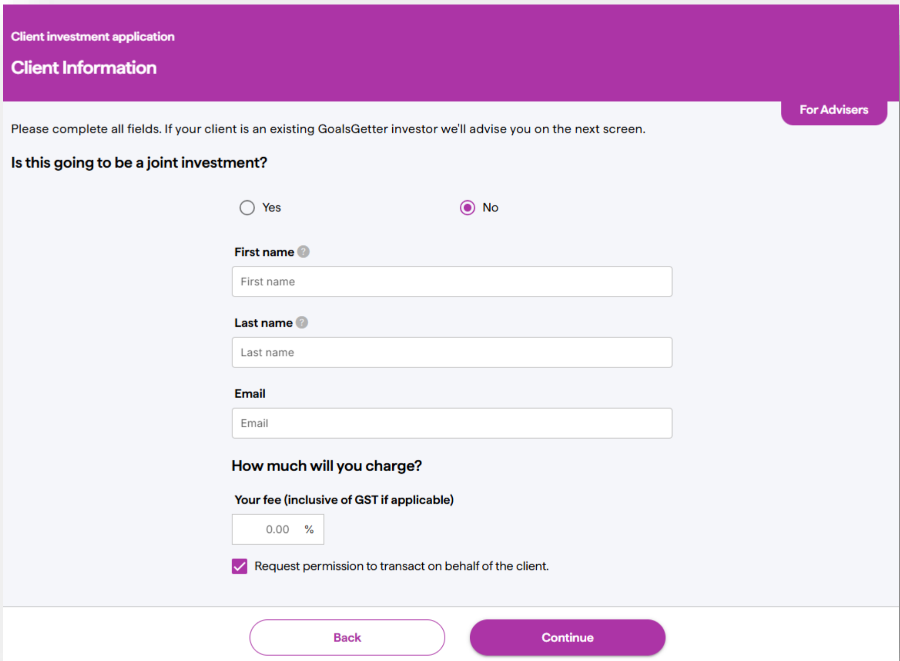
Please confirm these details are correct before clicking Confirm.



7. Please complete all fields. If your client is an existing GoalsGetter investor we will advise you on the next screen.

You will need to state if you will charge your client any additional fees.

You may, with the agreement of our client, charge an servicing and advice fee which is capped at 1.15% per annum.

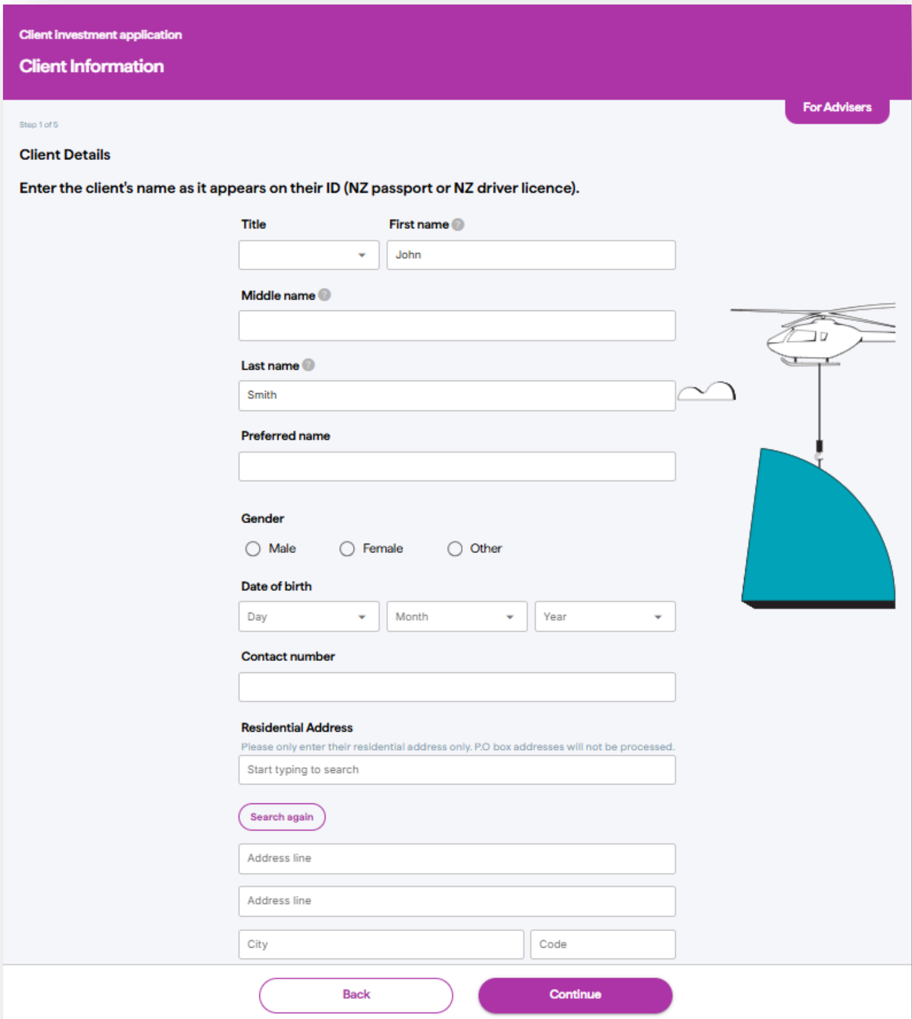


8. If your client is a new investor, you will need to enter their details in the following steps.

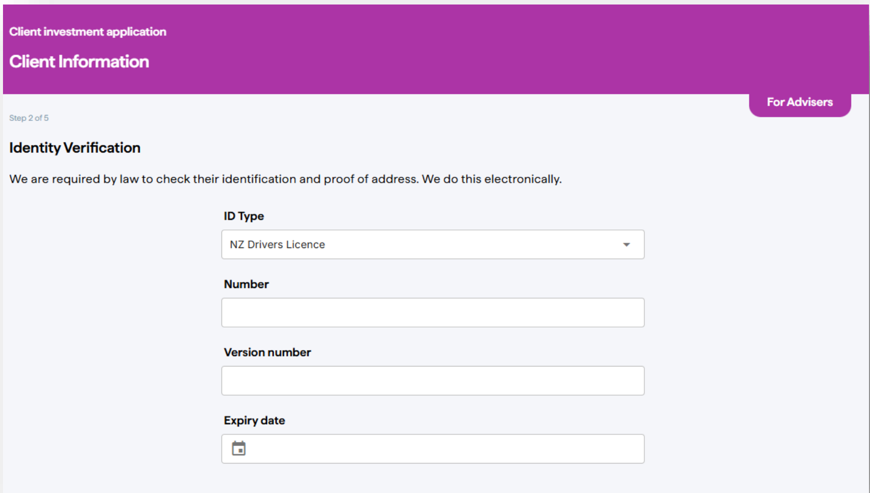
Please have on hand:

- Their NZ passport or driver's licence
- Their IRD number
- Their PIR number

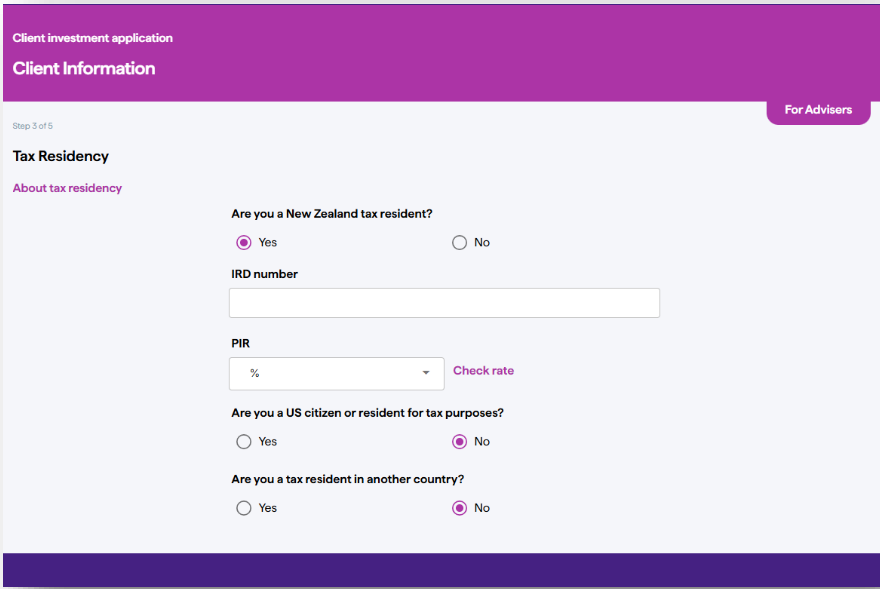
9. Enter your clients' details as it appears on their ID.



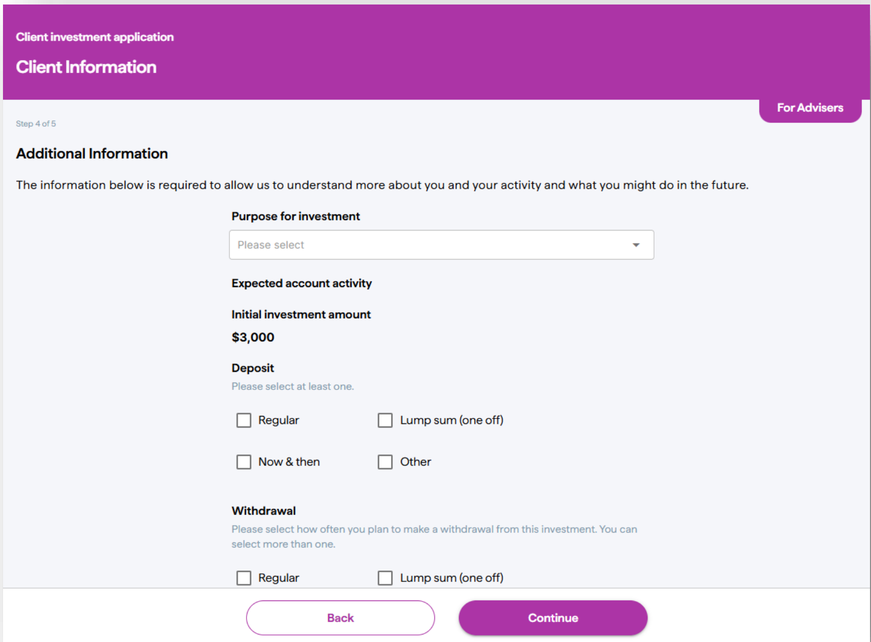
10. We are required by law to check your client's identification.



11. Client details – tax.



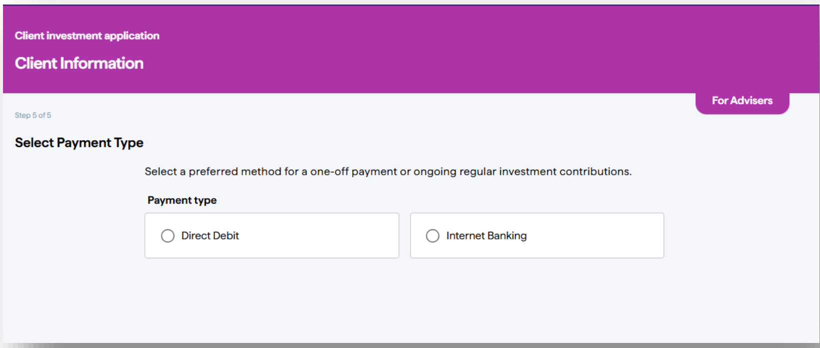
12. Please enter additional details regarding your client's investment such as purpose and expected account activity.



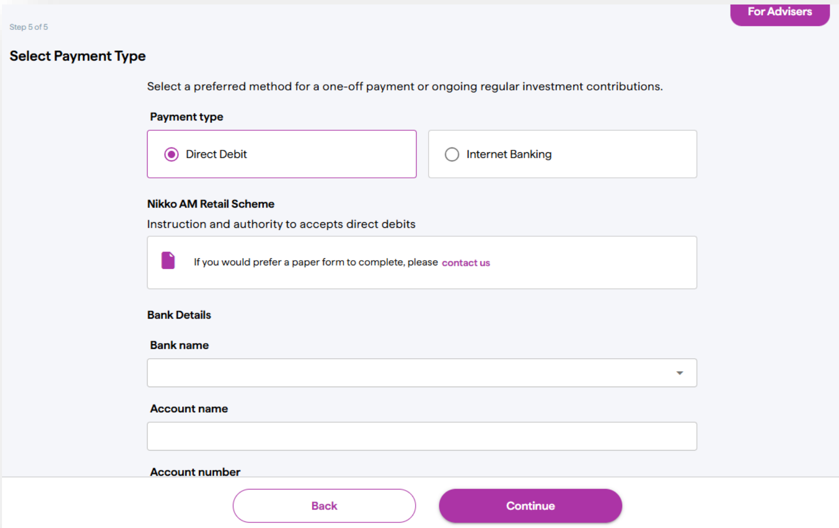
13. Please tell us the preferred method of payment for your clients ongoing regular investment contributions

Internet banking or direct debit.

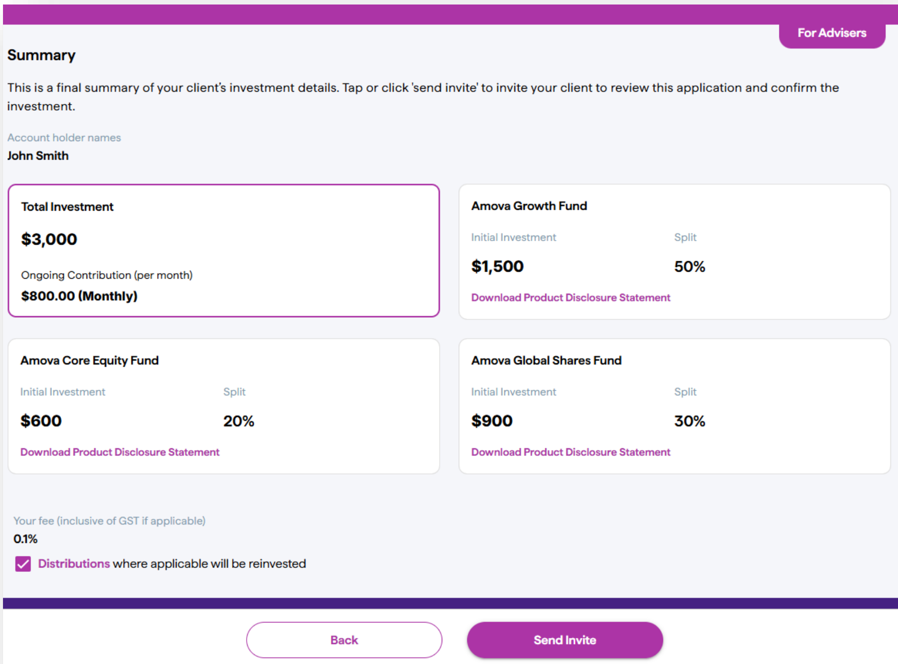
This will only be asked if the client wishing to make regular contributions to their investment.



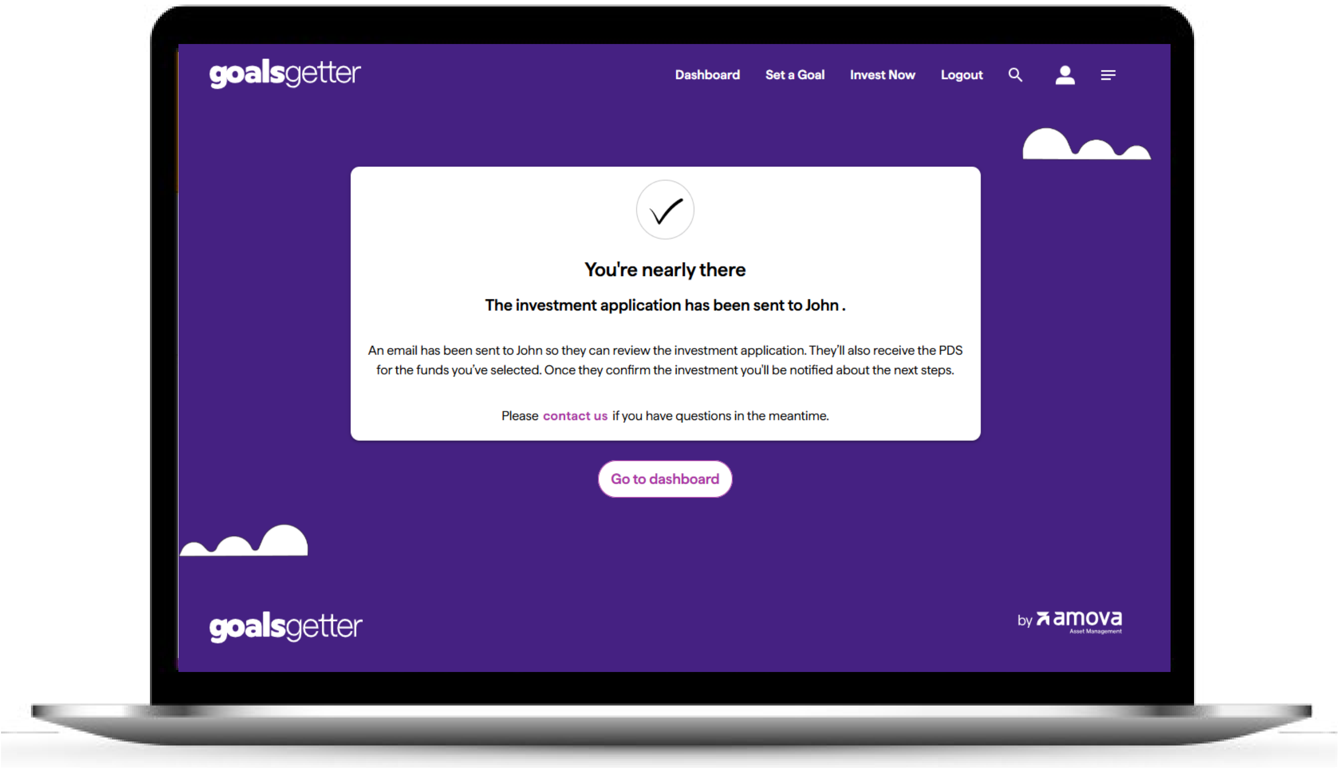
14. The direct debit can be set up on this screen. Once completed we will then send the request to your client's bank to get set up.



15. This is a final summary of your client's investment details. Tap or click 'send invite' to invite your client to review this application and confirm the investment.

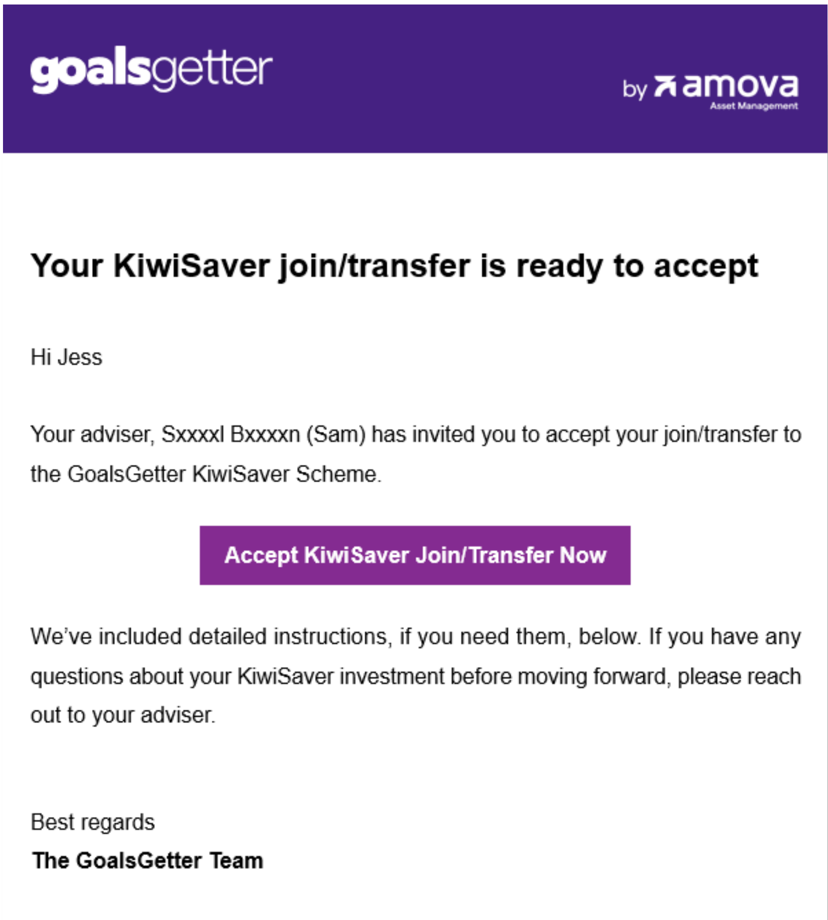


16. The investment application has been sent. An email has been sent to your client so they can review the investment application. They will also receive the PDS for the funds you've selected. Once they confirm the investment you'll be notified about the next steps.

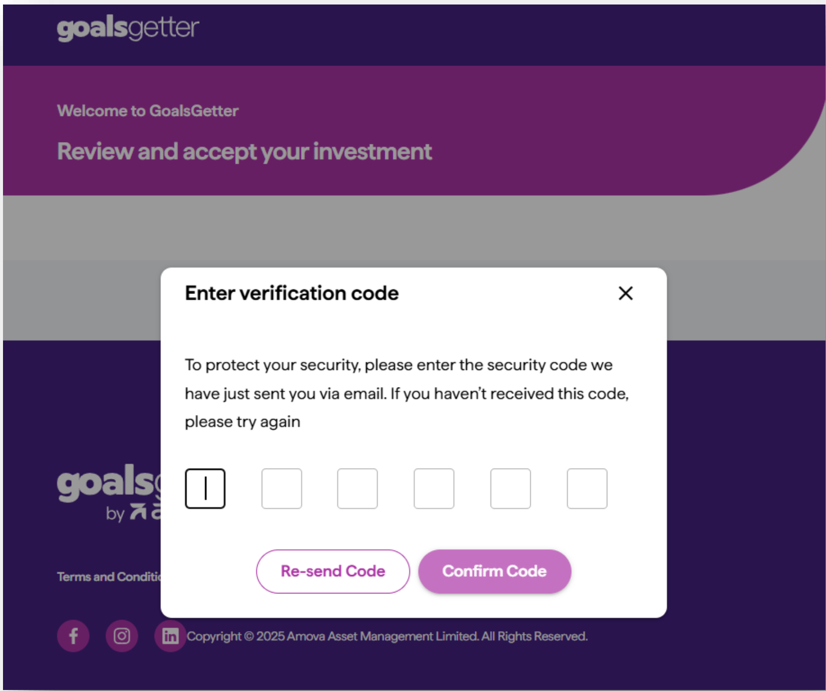


Client Steps

17. Receive invite, confirm set up by selecting 'Review Investment' within the email body copy. This will take you to GoalsGetter to review your details and accept your investment.



18. By clicking 'Review Your Investment', you will be redirected to the GoalsGetter app and be required to enter a 6-digit code which will also be emailed to your same address.

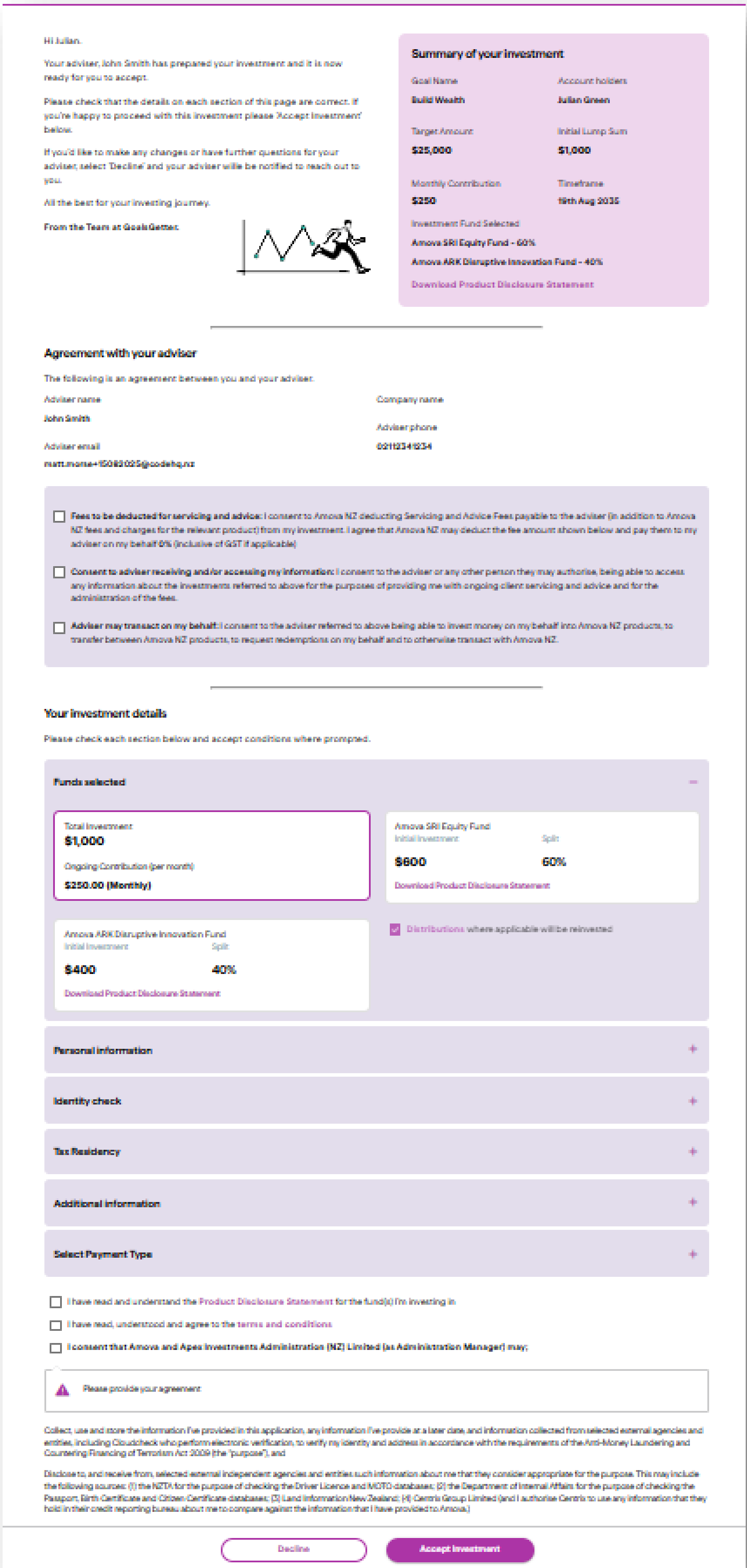


19. Next you will need to Review and accept your investment.

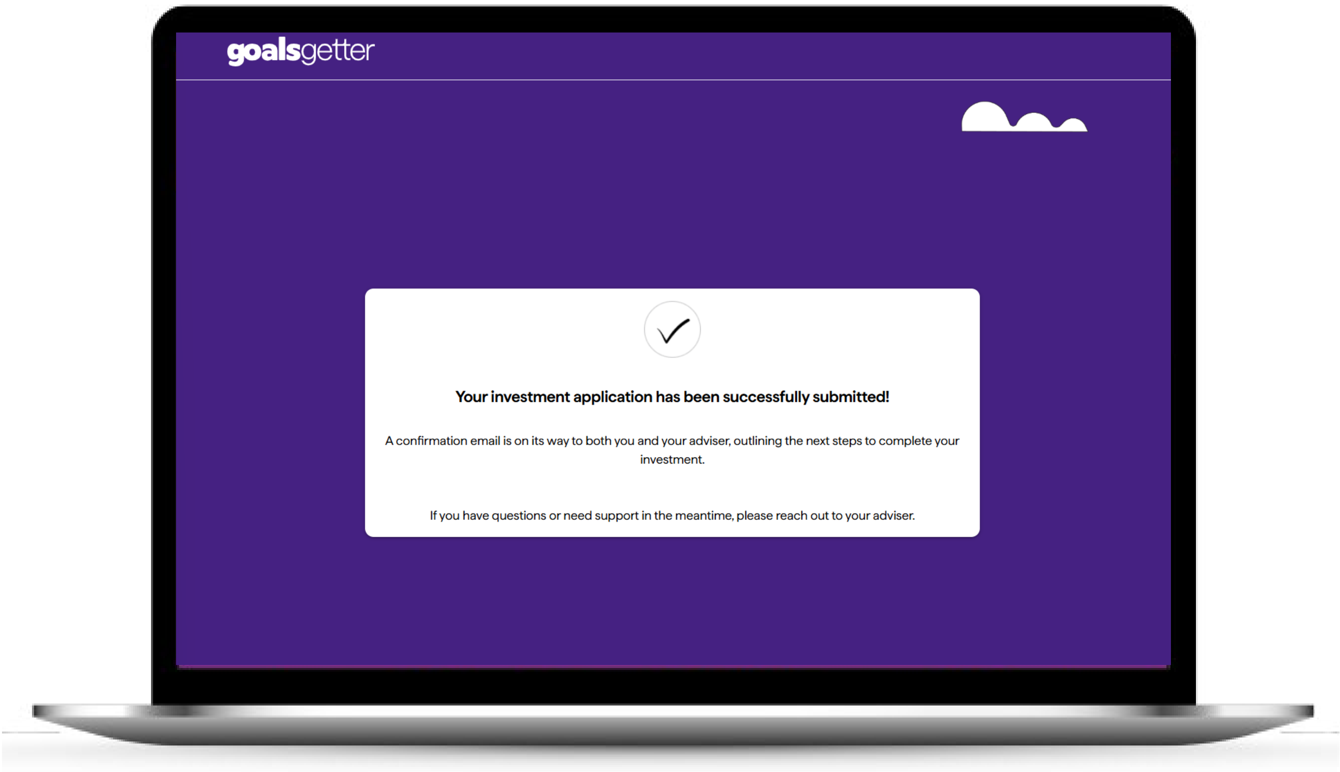
This includes checking the summary of your investment, your agreement with your adviser, and all investment details including your personal information were entered correctly by your adviser.

Do so by scrolling through and clicking the '+' button to review the entered details within each section, like below.

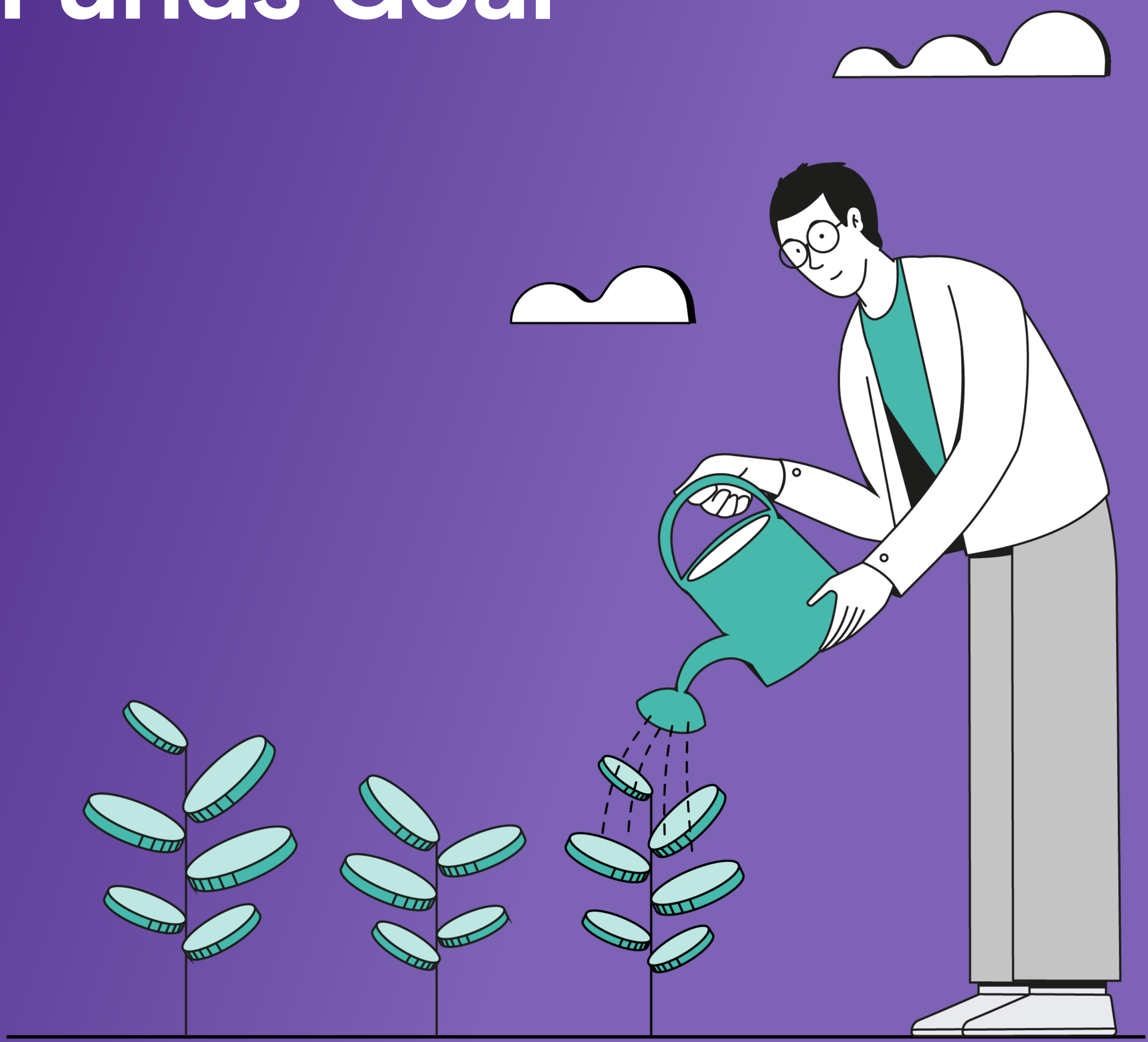
Once you have reviewed all the information and accepted everything required, click the 'Accept Investment' button.



20. Upon accepting, you will see a confirmation screen, and you will also receive a confirmation email that your investment application has gone through, along with next steps. Your adviser will also be notified.



Setting up a client: Set a Managed Funds Goal

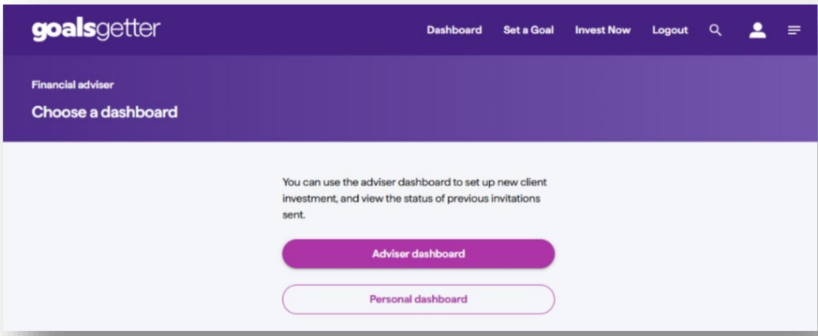


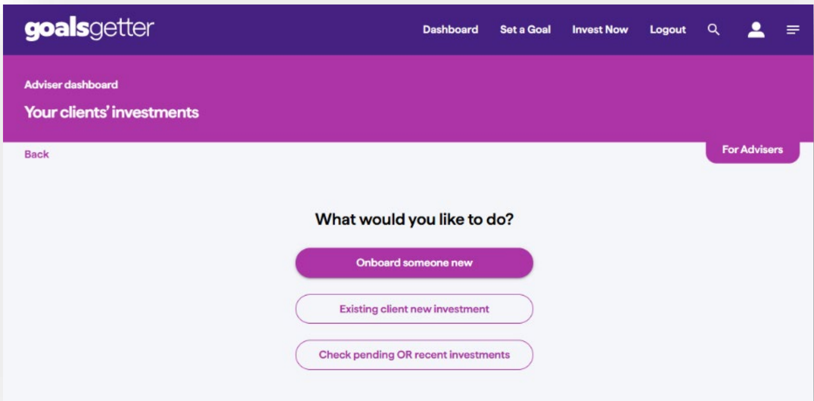
4. Setting up a client: Set a Managed Funds Goal

Adviser Steps

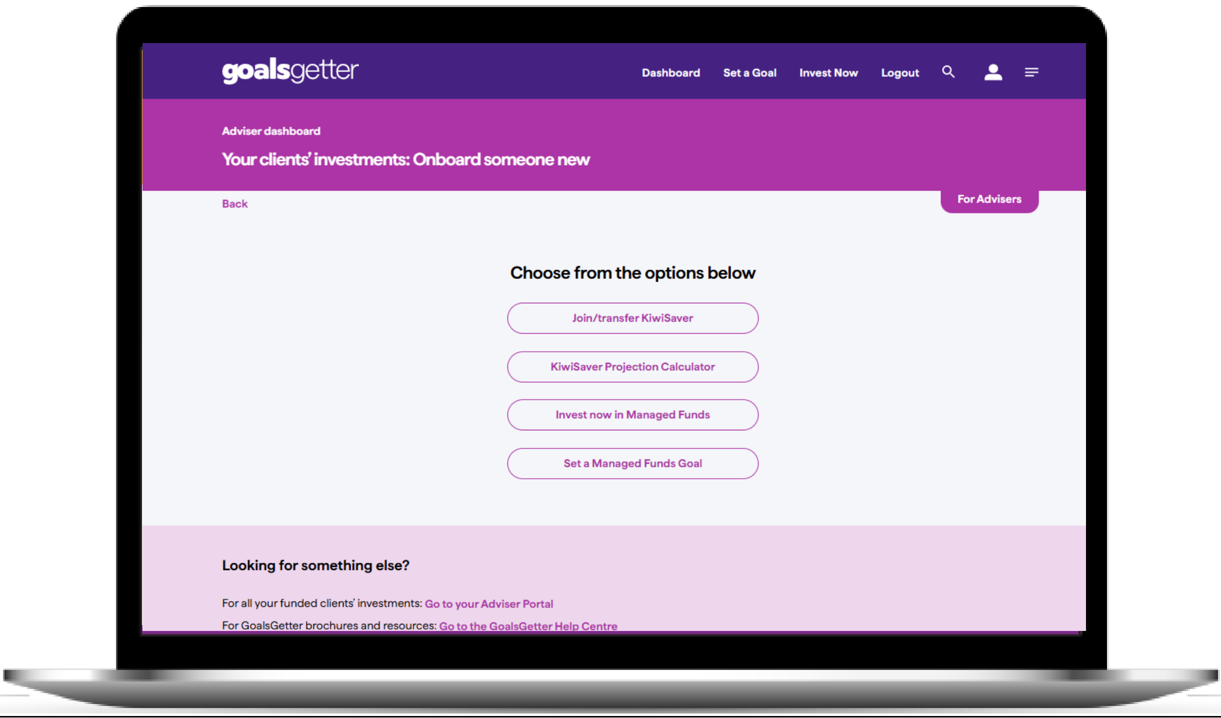
1. Visit www.goalsgetter.co.nz and login with your personal credentials.

   Select Adviser dashboard, then onboard someone new.

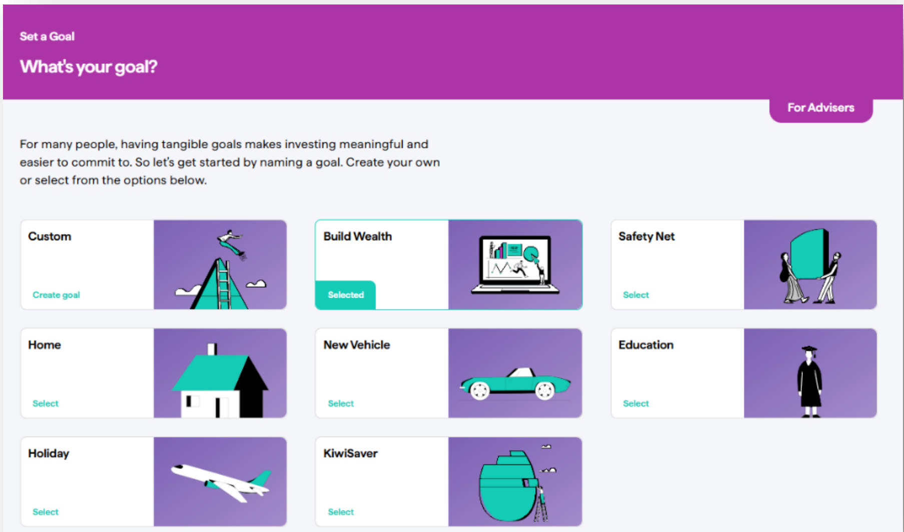




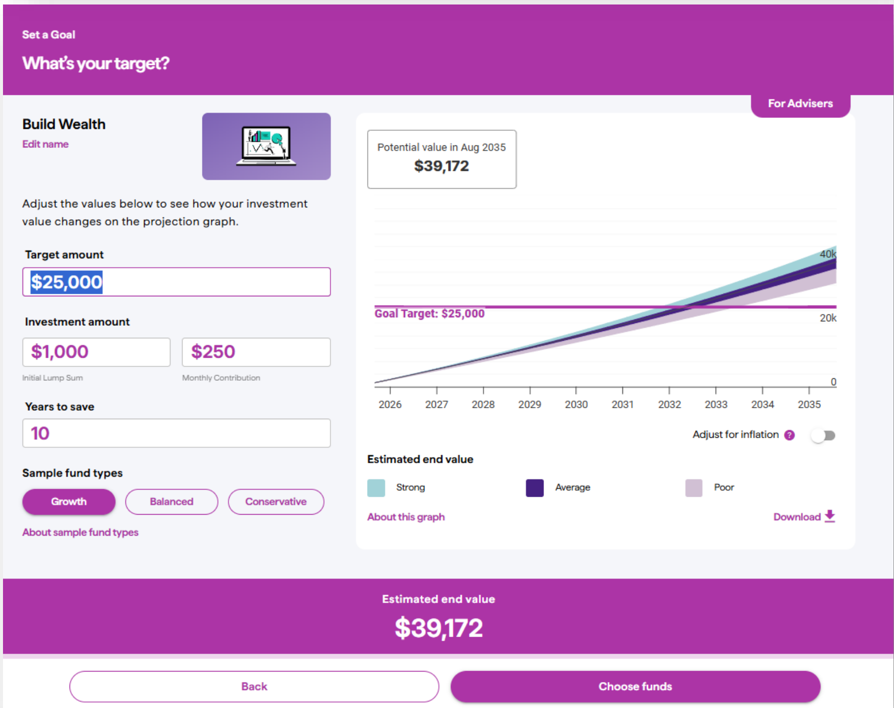
Select 'Set a Managed Funds Goal' here



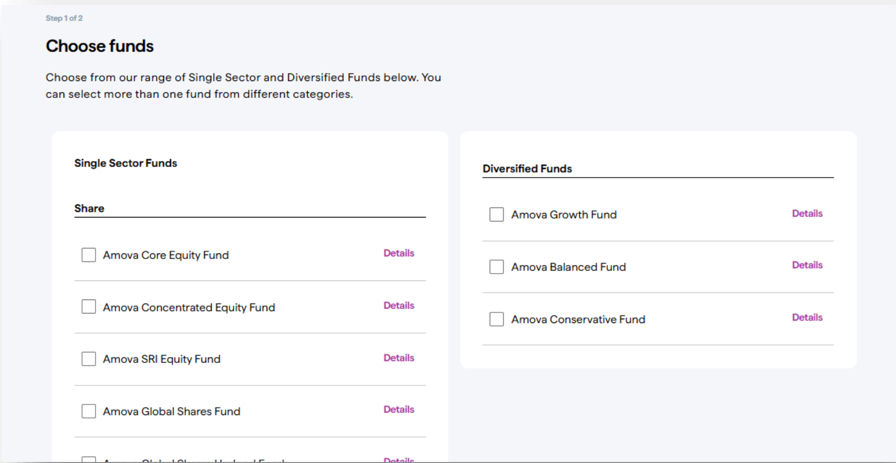
2. For many people having tangible goals makes investing meaningful and easier to commit to. So, let's get started by naming a goal. Create your own or select from the premade options.



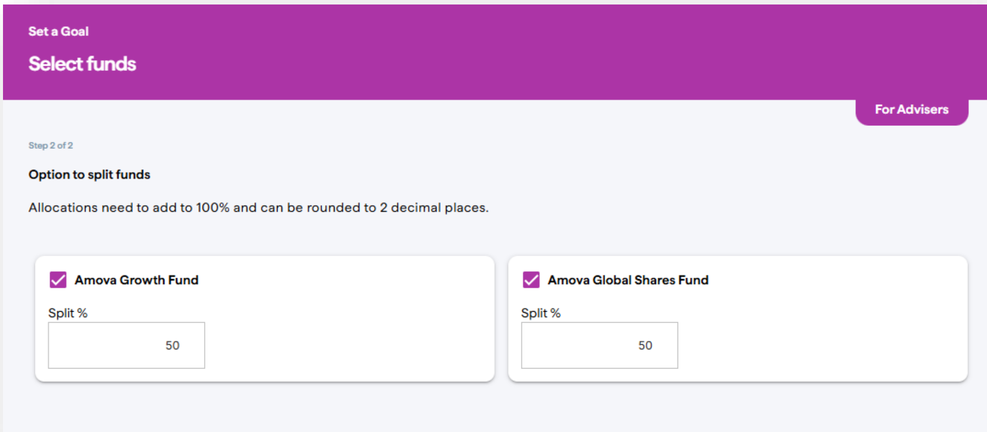
3. Adjust the values below to see how your client's investment value changes on the projection graph.



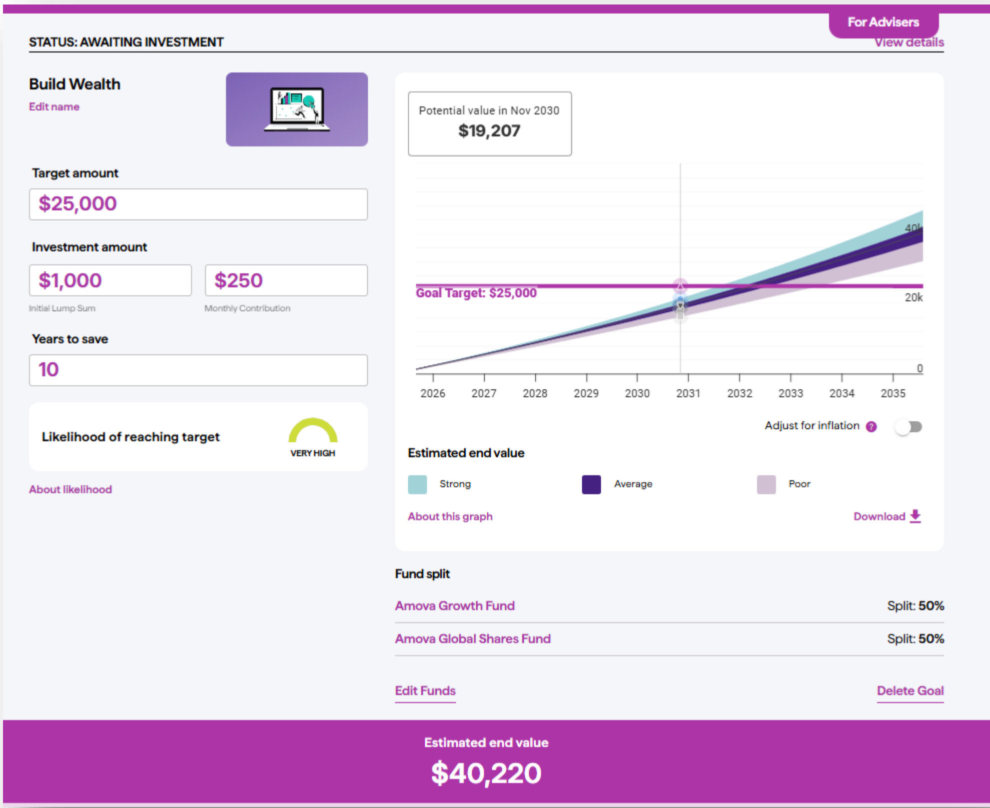
4. Select Funds:
Choose from our range of Single Sector and Diversified Funds. You can select more than one fund from different categories.



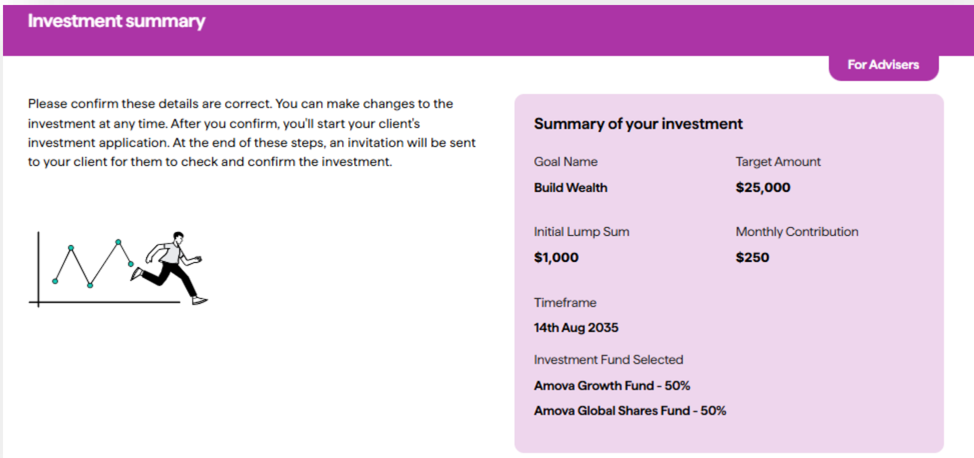
5. Option to split funds. Allocations need to add to 100% and can be rounded to 2 decimal places.



6. Confirm goal parameters with new fund allocations applied.



7. Investment Summary: Please confirm these details before clicking Continue.

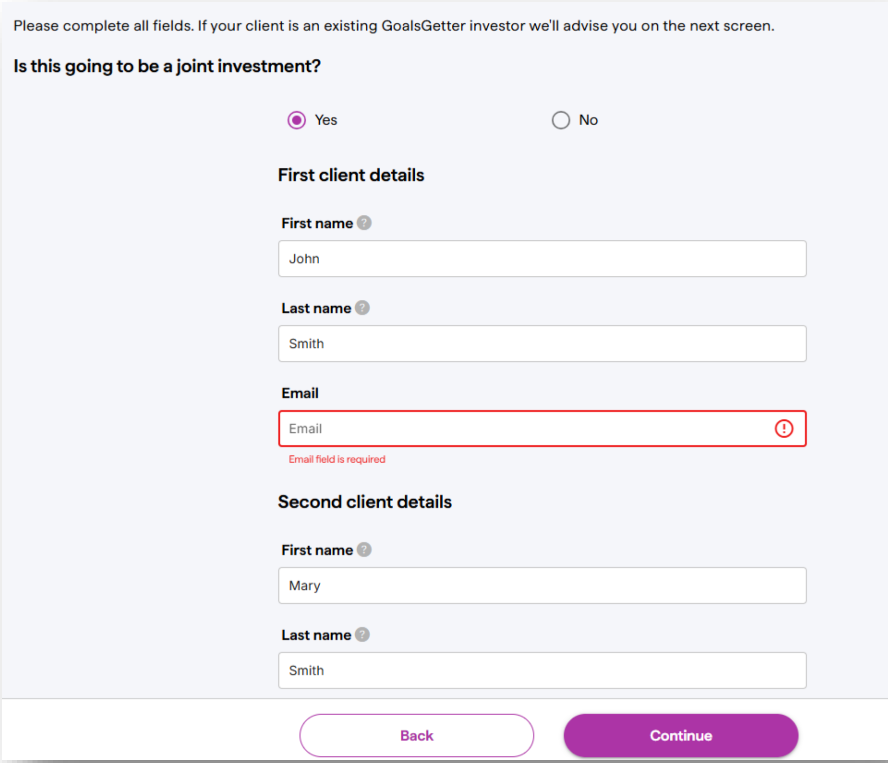


8. Client information: Is this account for an individual or joint investors?

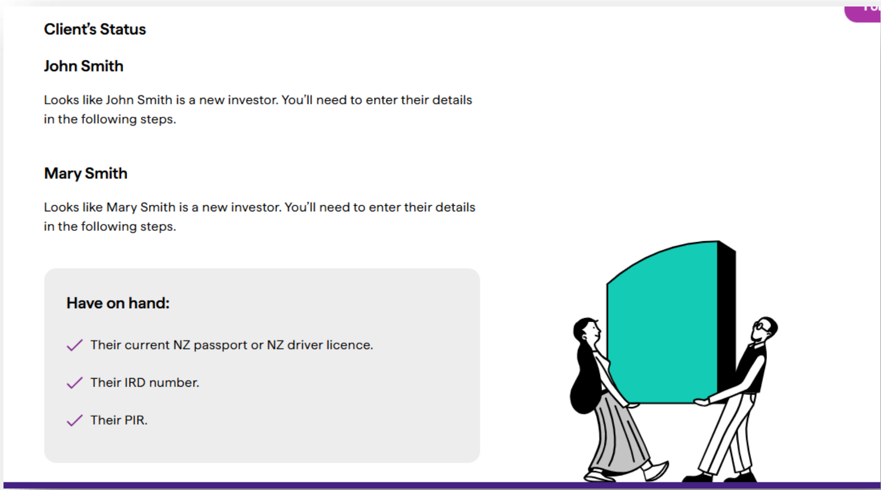
For this flow, we will proceed with a joint account.

You will need to state if you will charge your client any additional fees.

You may, with the agreement of our client, charge an servicing and advice fee which is capped at 1.15% per annum.

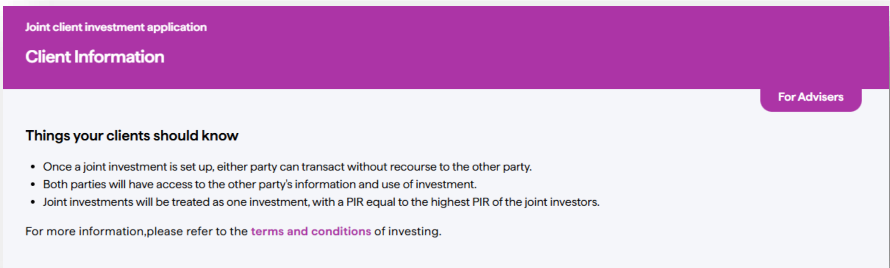


9. Client information – Client status confirmation.

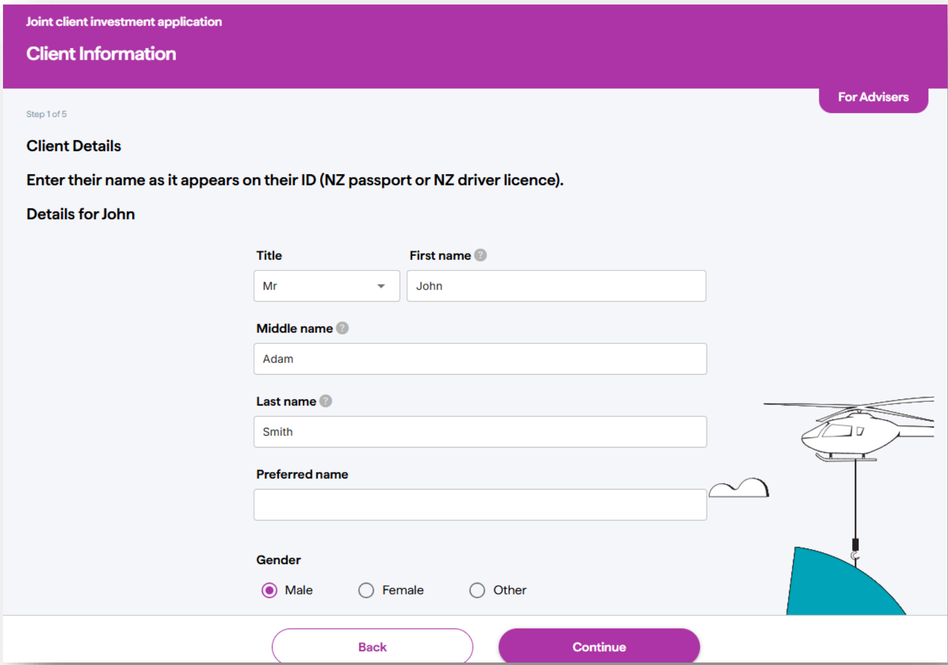


10. If you client/s are a new investor, you will need to enter their details in the following steps. Please have the following on hand.

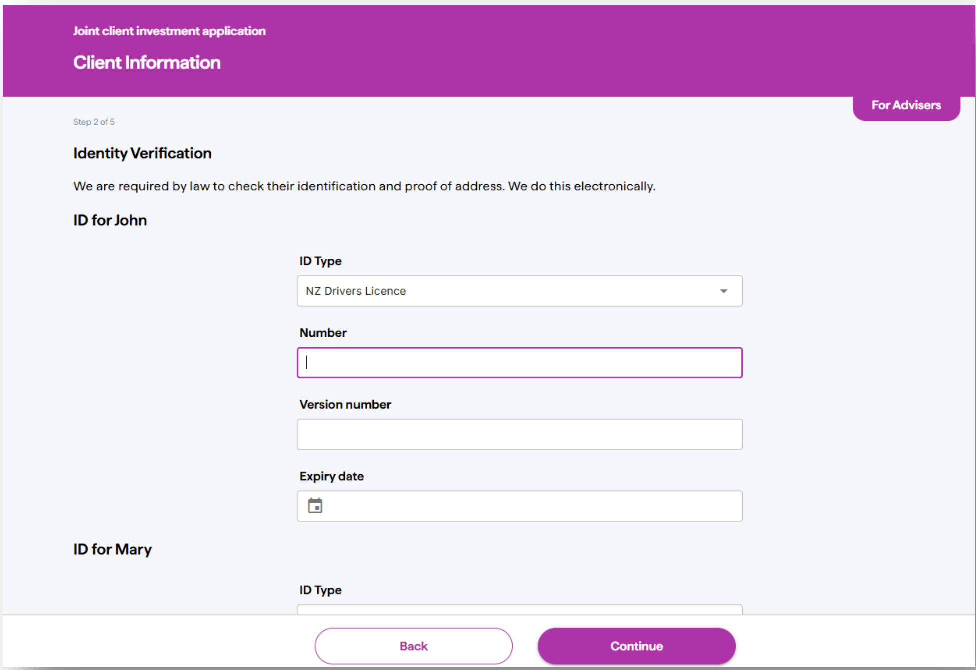
- Their NZ passport or drivers' licence
- Their IRD number
- Their PIR number



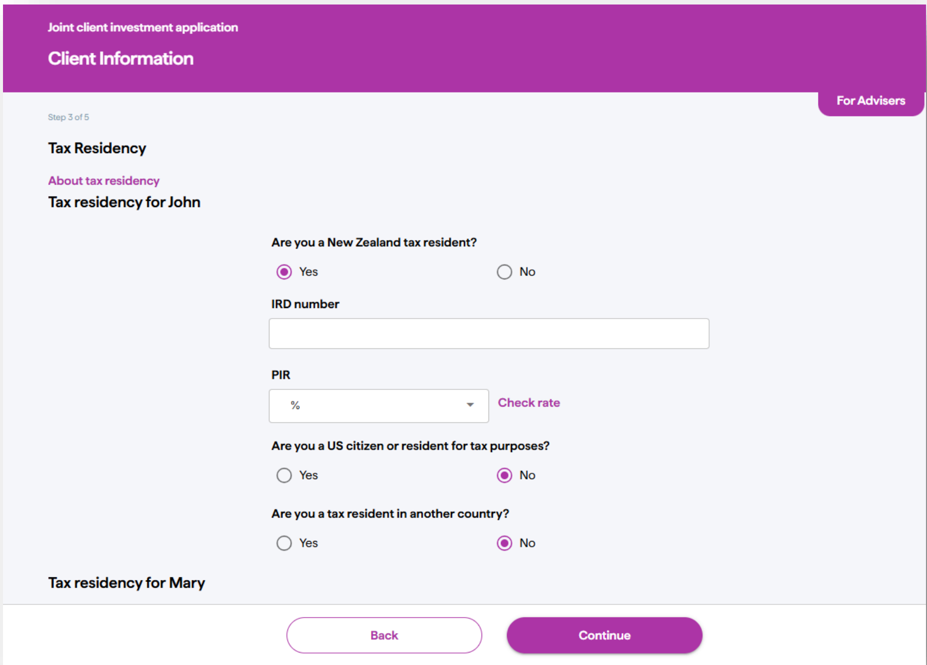
11. Enter the client's name/s as it appears on their ID.



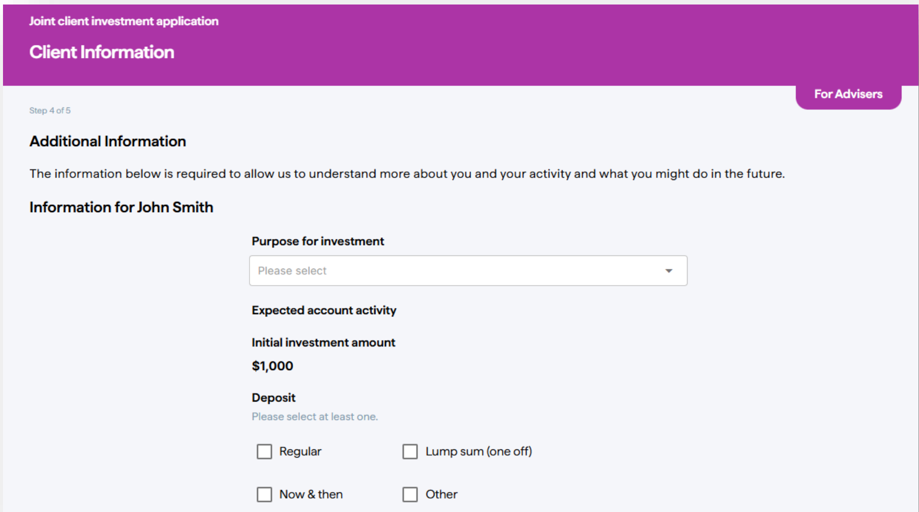
12. We are required by law to check your client's identification.



13. Client information – Tax.



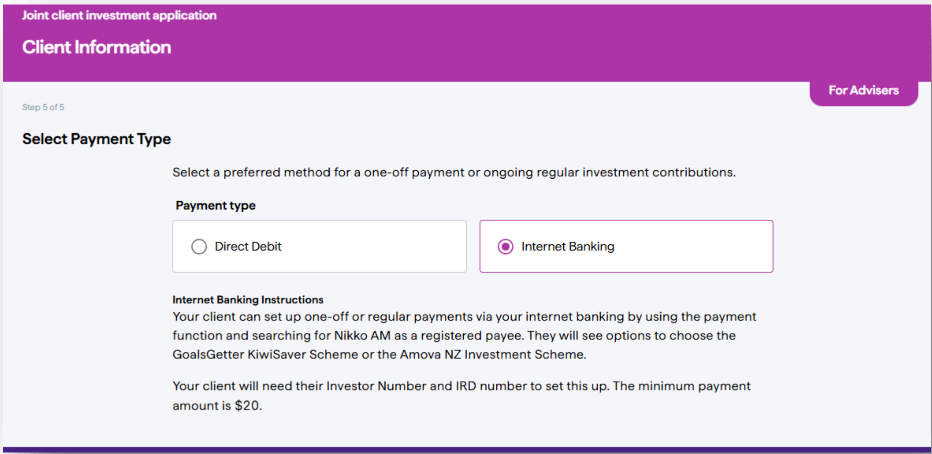
14. Pleaseenter the details regarding your client's investment such as purpose and expected account activity.



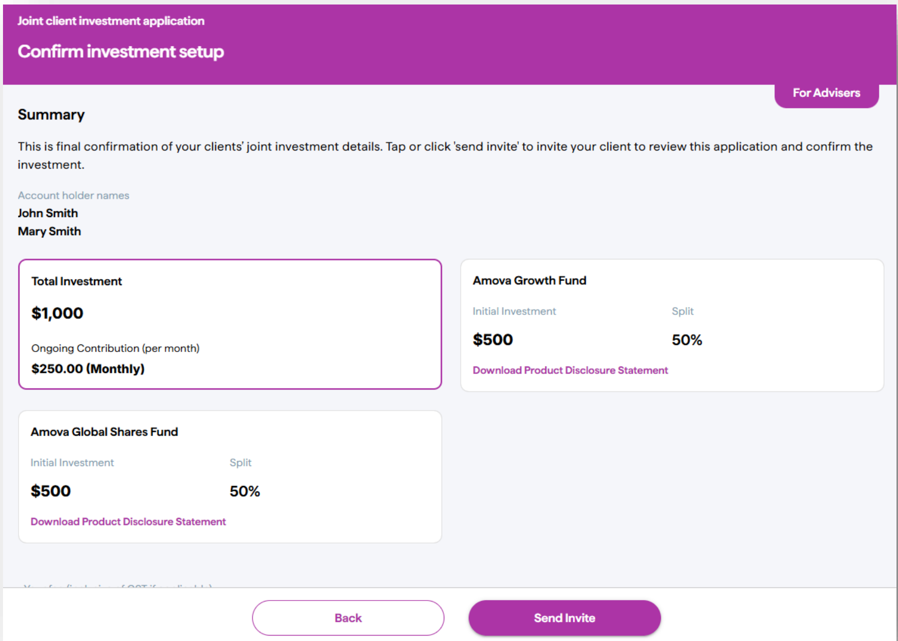
15. Please tell us the preferred method of payment for your clients ongoing investment contributions.

Internet banking or direct debit.

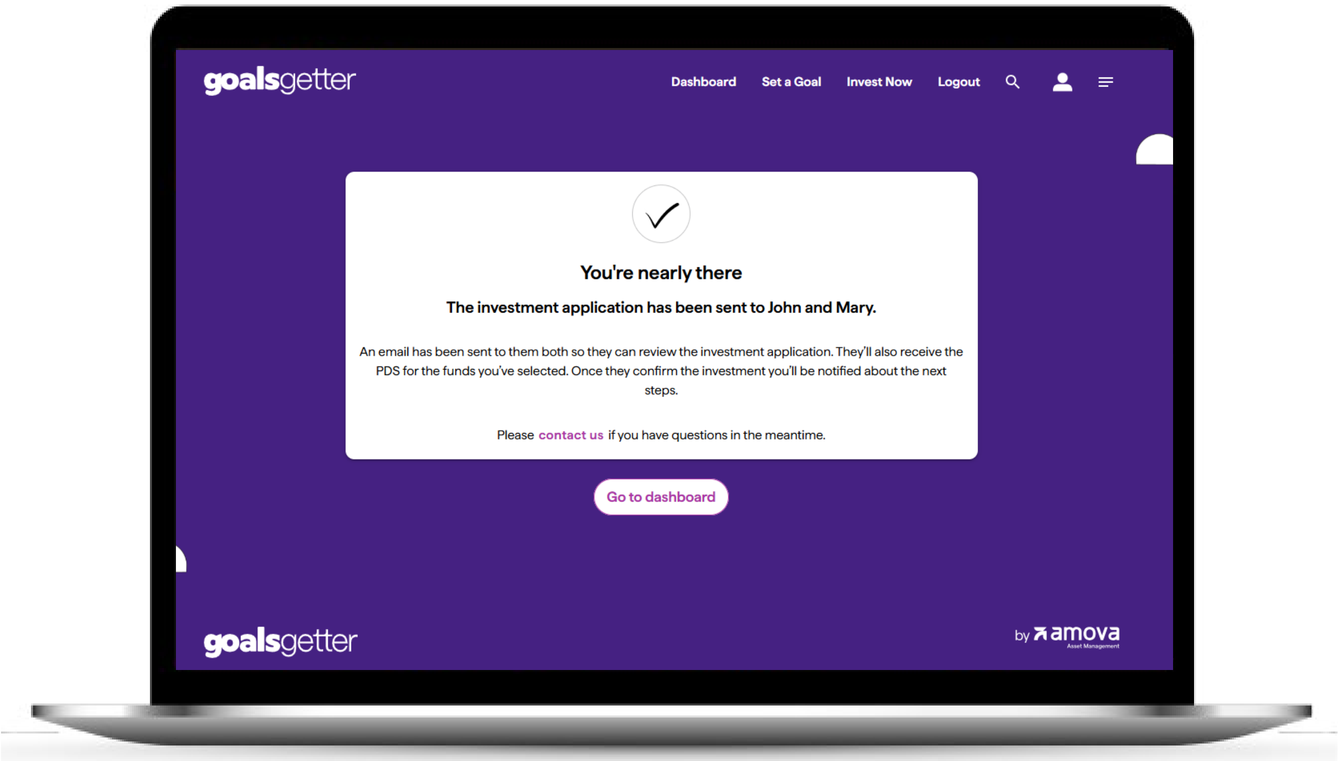
*This will only be asked if the client wishes to make regular contributions to their investment.



16. This is a final summary of your client’s investment details. Tap or click ‘send invite’ to invite your client/s to review this application and confirm the investment.

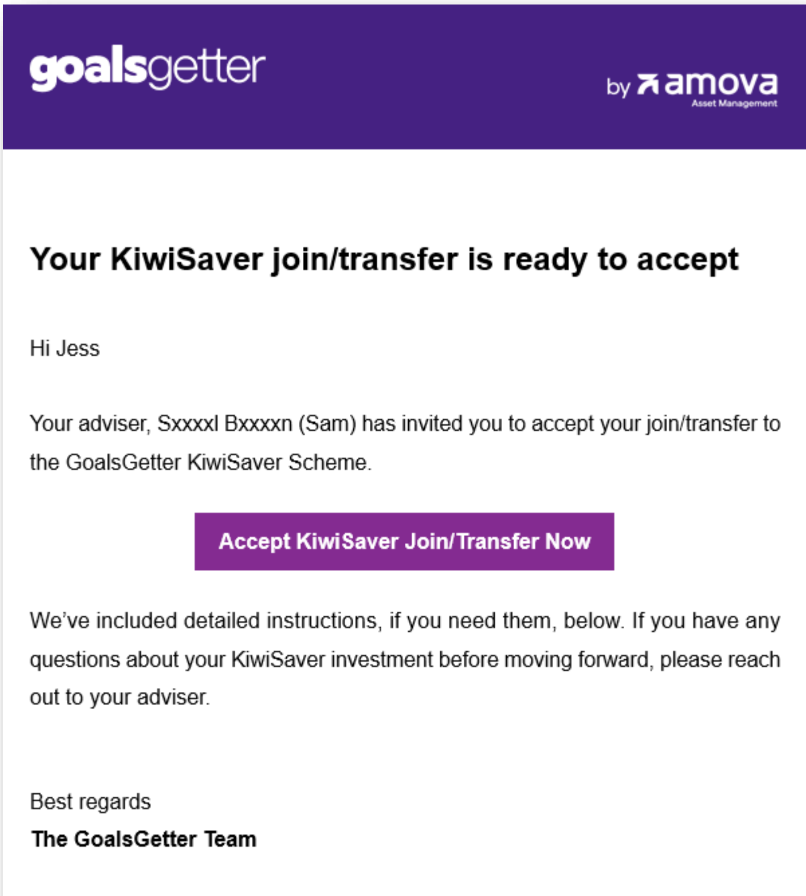


17. The investment application has been sent. An email has been sent to your client/s so they can review the investment application. They will also receive the PDS for the funds you have selected. Once they confirm the investment you will be notified about the steps.



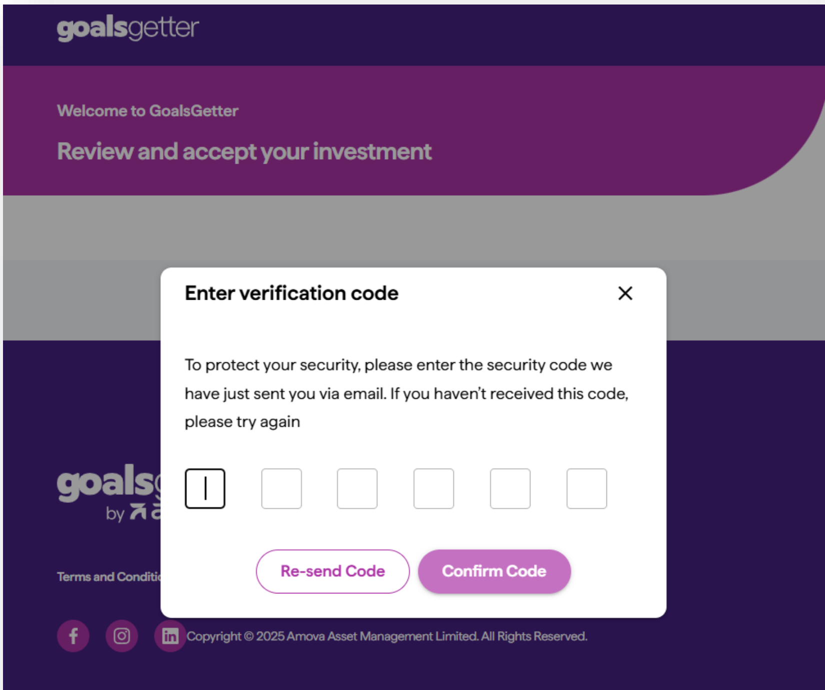
Client Steps

1. Receive invite, confirm set up by selecting 'Review Investment' within the email body copy. This will take you to GoalsGetter to review your details and accept your investment.



2. By clicking 'Review Your Investment', you will be redirected to the GoalsGetter app and be required to enter a 6-digit code.

   To receive the verification code, click 'Get Code' and it will be sent to your same email inbox.

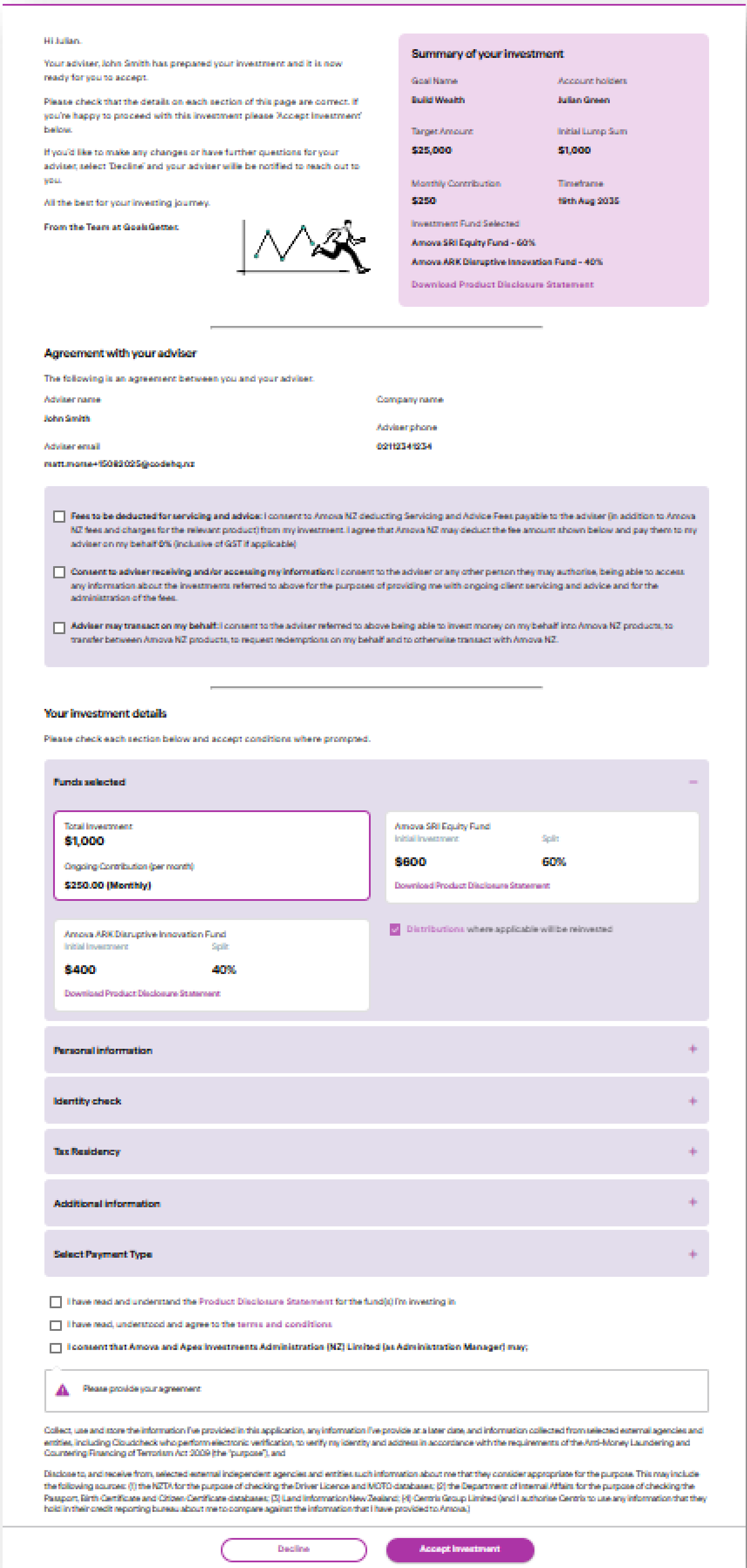


3. Next you will need to Review and accept your investment.

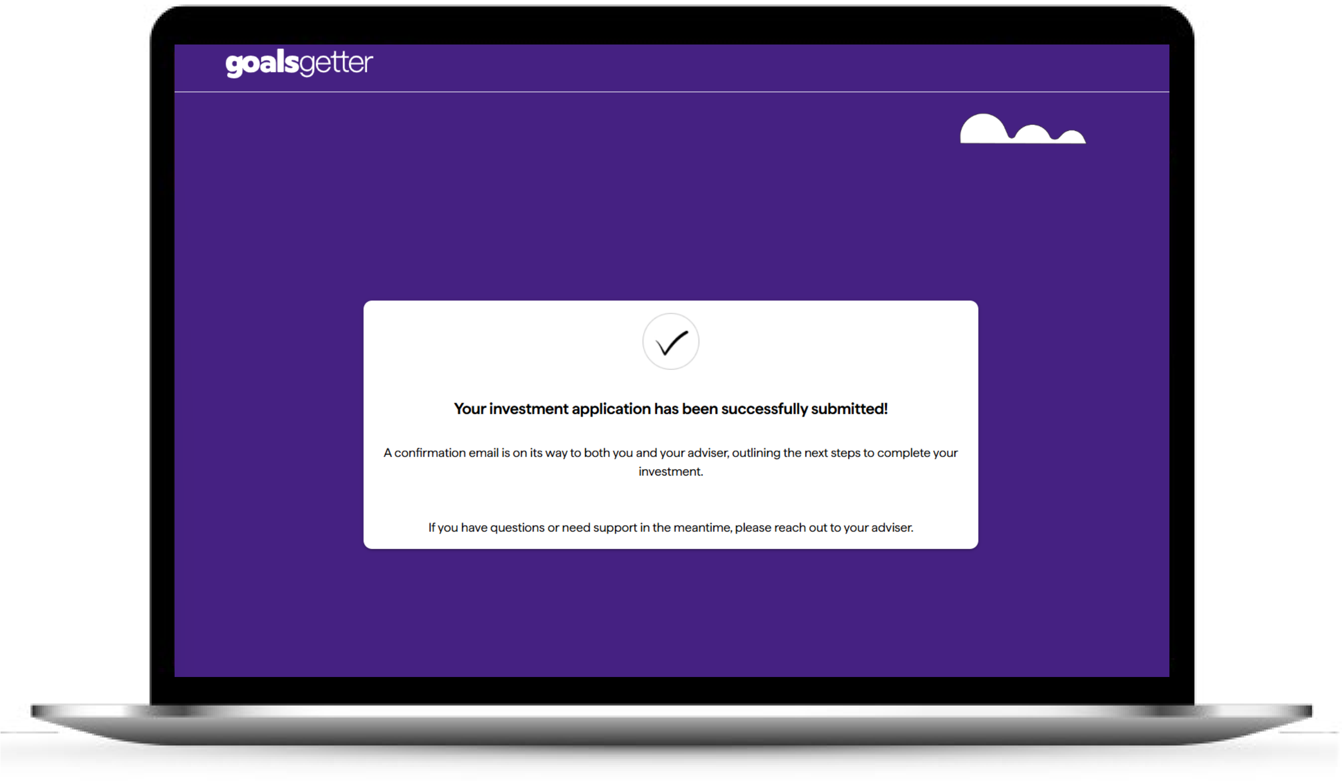
This includes checking the summary of your investment, your agreement with your adviser, and all investment details including your personal information were entered correctly by your adviser.

Do so by scrolling through and clicking the '+' button to review the entered details within each section, like below. If there are any mistakes you can edit them here.

Once you have reviewed all the information and accepted everything required, click the 'Accept Investment' button.



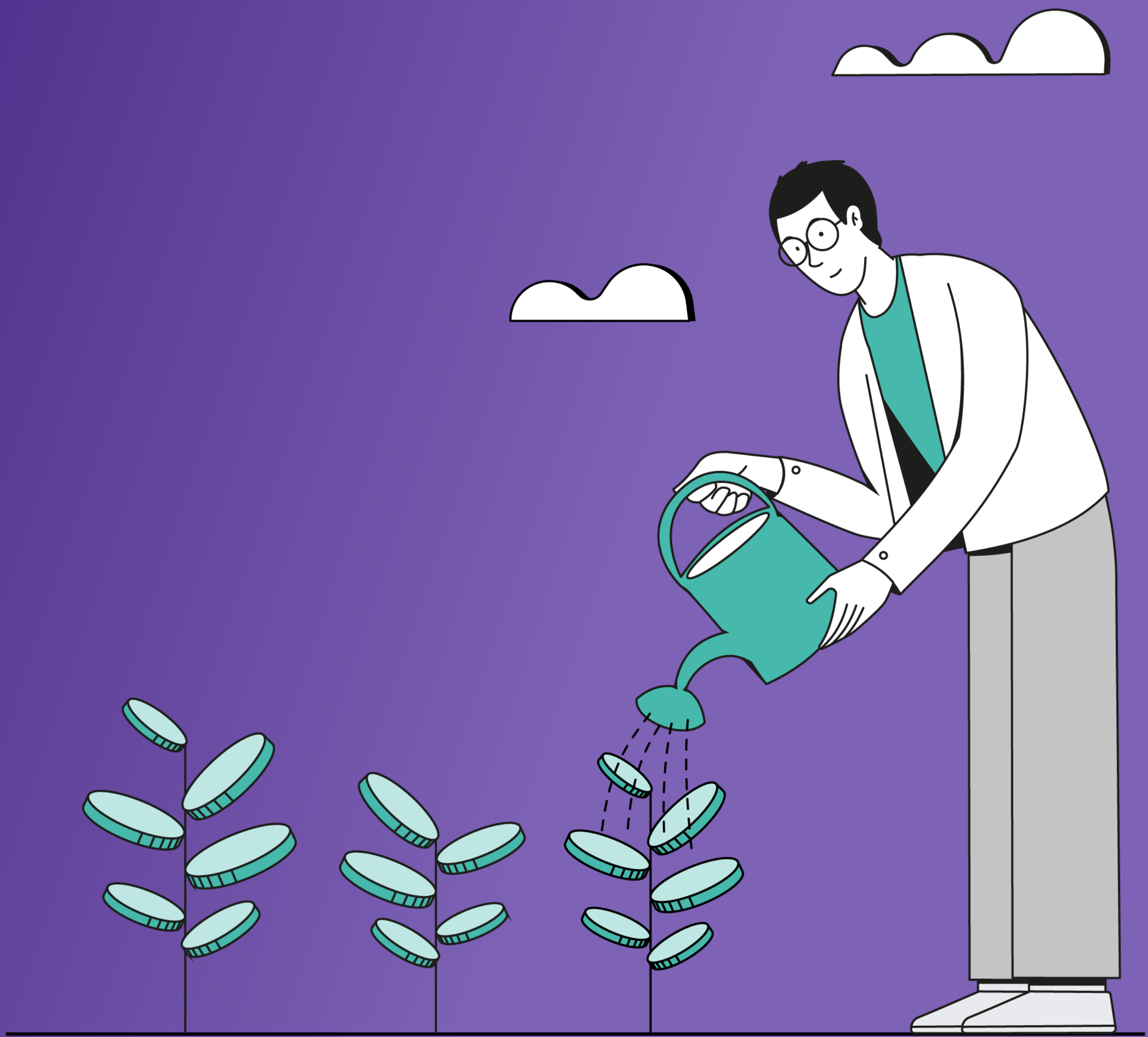
4. Upon accepting, you will see a confirmation screen, and you will also receive a confirmation email that your investment application has gone through, along with next steps. Your adviser will also be notified.



KiwiSaver

goalsgetter

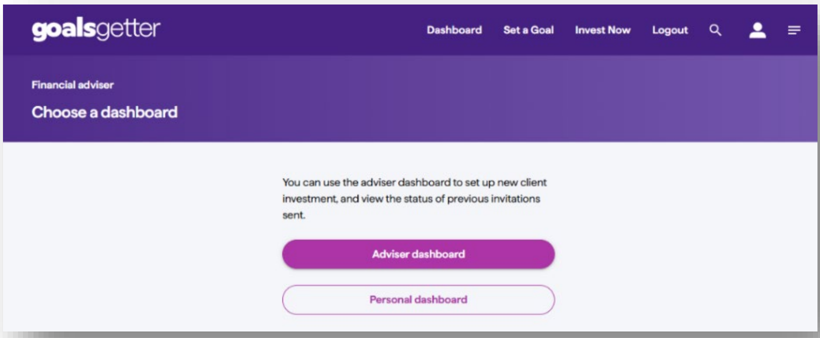
Navigating your Adviser Dashboard

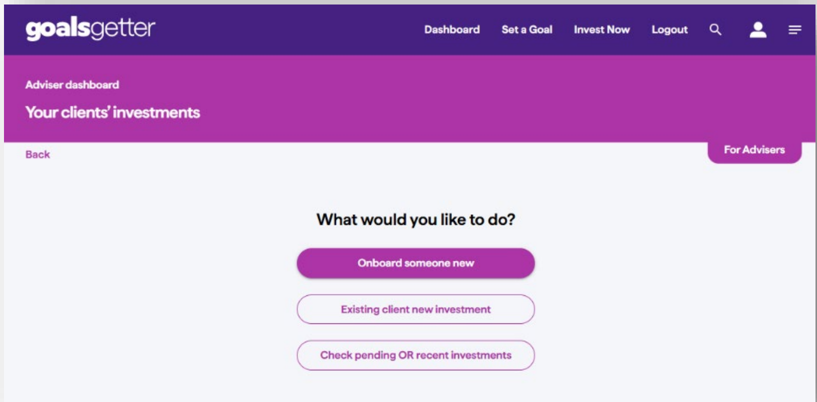


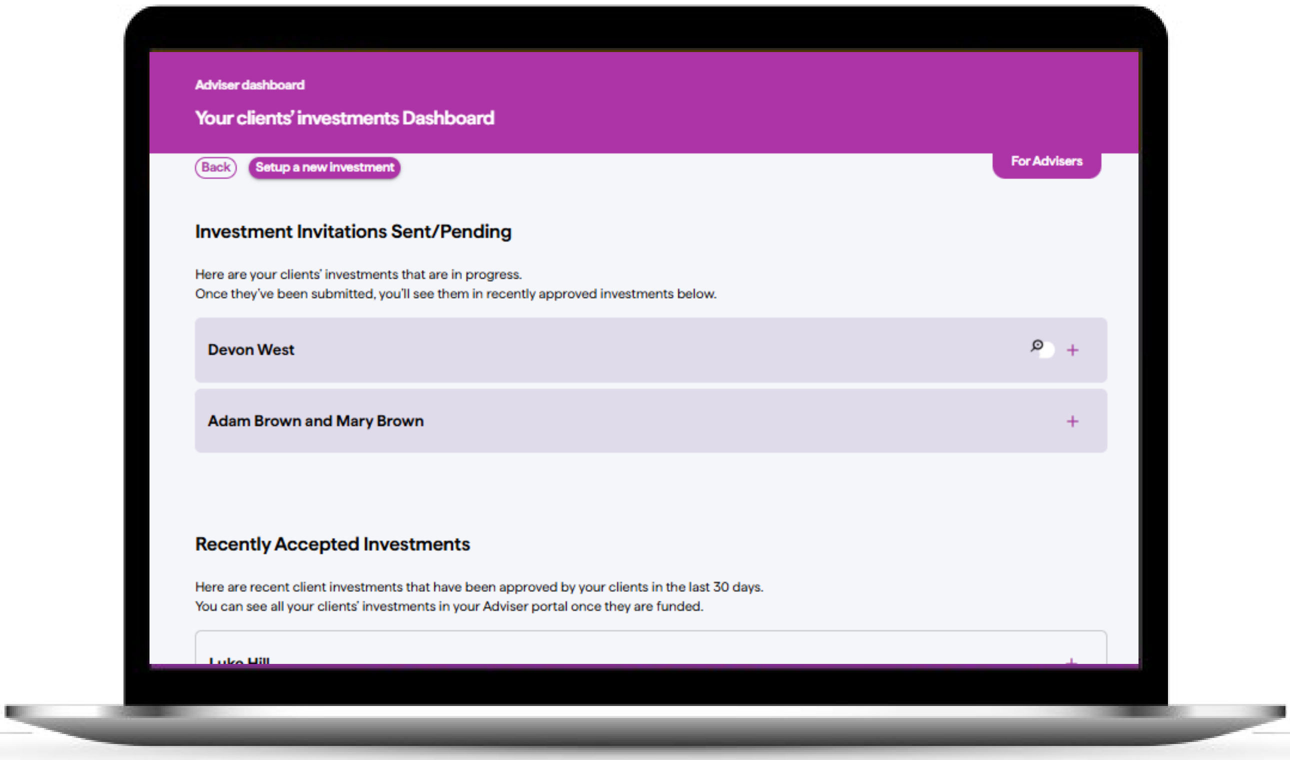
5. Navigating your Adviser Dashboard

1. Visit www.goalsgetter.co.nz and login with your personal credentials.

   Select Adviser dashboard, then ‘Check pending OR recent investments’





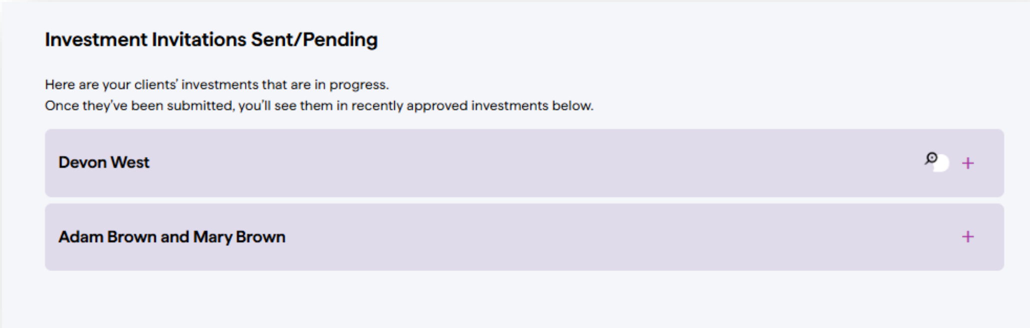


2. On your adviser dashboard, there will be three different sections:

- Investment invitations Sent/Pending
- Recently Accepted Investments
- Unsubmitted Investments/ Saved Projections

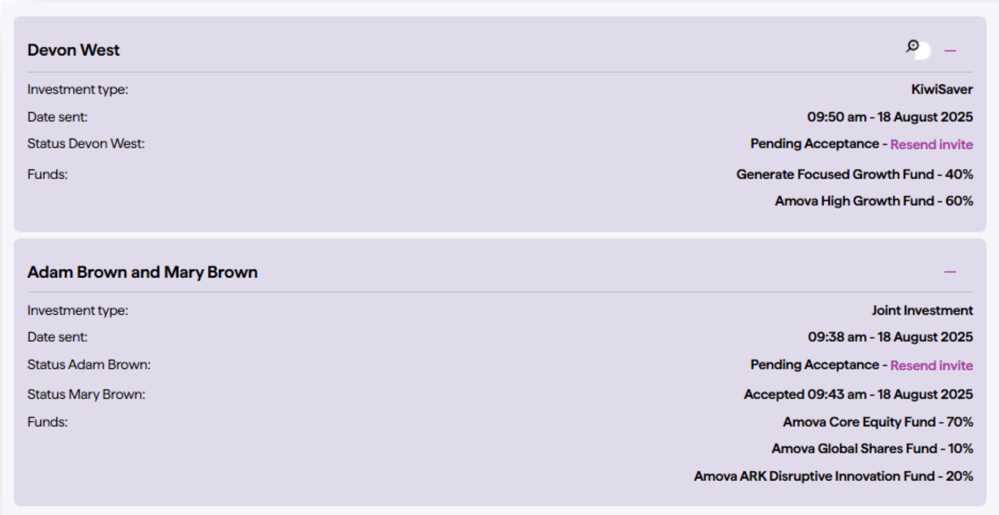
3. Investment Invitations Sent/Pending will show all your clients' investment that are in progress.

Investments will appear with the client's name as the title, and on the right-hand side you can tap the '+' to expand each investment. KiwiSaver investments will have a Kiwi icon.



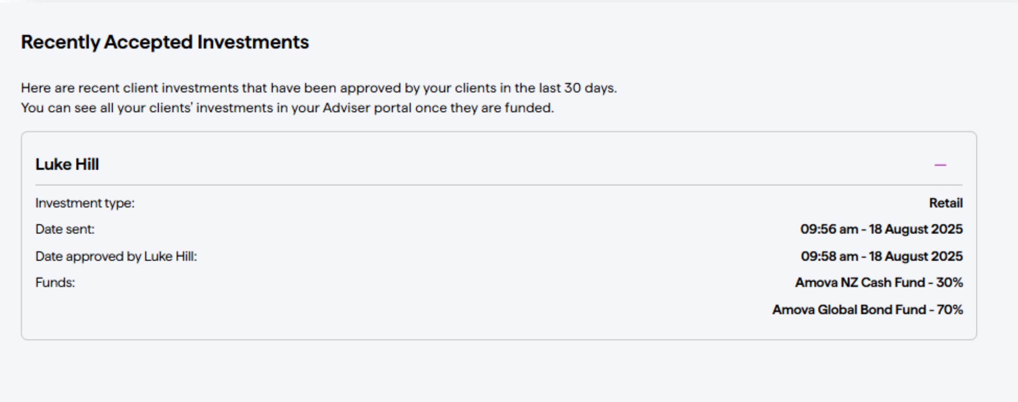
4. By expanding each investment in this section, you will be able to see the following details:

- Investment type
- Date you sent your client the invite
- Status of investment
- Funds selected for investment



You will also be able to resend the email investment invitations, and for joint investments you can see who has and has not accepted the investment. Once the investment invitation has been accepted, their investment tab will move to the lower section on your dashboard – 'Recently Accepted Investments'

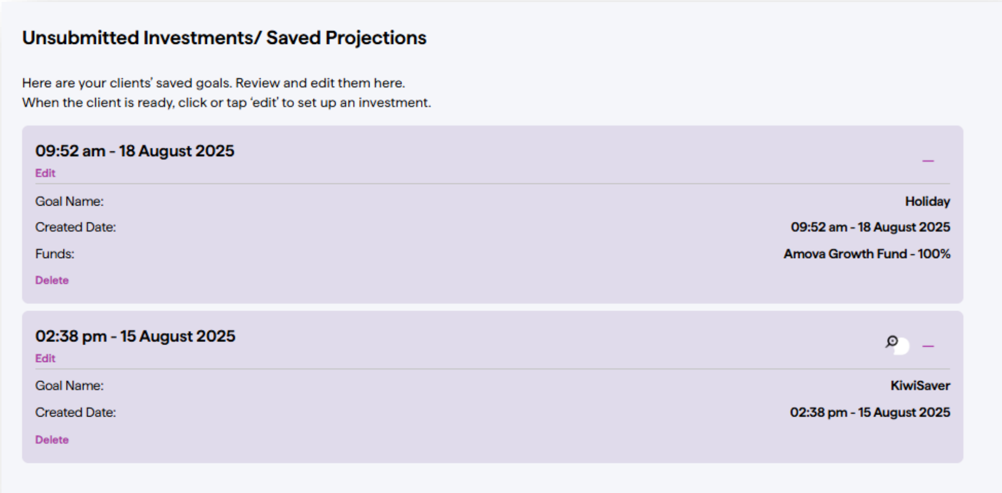
5. 'Recently Accepted Investments' shows the recent client investments that have been approved by your clients in the last 30 days. You can see all your clients' investments in your Adviser portal once they are funded.



6. Unsubmitted Investments / Saved Projections: Here you will find your clients saved goals that you did not complete setting up an investment for.

Each time you make a projection or start a goal they will be saved here and titled with the date and time created.

When the client is ready, you can click or tap 'edit' to finish setting up the investment and then it will move up to the 'Investment Invitations Sent/Pending' section.



7. If you are looking for the GoalsGetter Help Centre, you can quickly navigate to these through your dashboard by clicking on the links at the bottom of the page.