



## Richard Maloy

BBS (Finance), Dip Fin. Serv.

SENIOR WEALTH ADVISER

*Authorised Financial Adviser (FSP458766)*

### MANAGING YOUR WEALTH - LONG TERM

#### HOW I CAN HELP YOU

You are successful in your own field, but can benefit from having a professional on your side when it comes to structuring your money and getting you on the path to growth.

Utilising my expertise and access to the world of finance, we will sit down and construct your personalised investment portfolio based on your goals and ambitions for the future. Naturally that will include your plans for retirement and KiwiSaver, as well as everything in between. We will do this wherever you are most comfortable – your place or ours.

Working with Cole Murray, a firm owned and operated by real people, we share the same values of personalised service and a genuine respect for our clients. Cole Murray also offers a range of other financial services that can assist you along your financial life journey.

#### THE BENEFIT OF BROAD EXPERIENCE

I have been in finance for over 12 years, including 10 years in currency and commodity trading in Sydney. Having experienced the GFC and the ensuing challenges at home and off-shore, I have highly developed risk management skills that will benefit you as we assess the various options open to you.

My expertise is broad across the finance sector, with experience in all classes from a trading and investment point of view. Cash, trading, shares or fixed interest – I will advise you with assurance.

#### INTEGRITY ABOVE ALL ELSE

In my line of work, and operating in the provinces, confidentiality and integrity are paramount. New Zealand is starting to see a new level of honesty and transparency for the finance sector – an imperative in my view. As our relationship progresses, you will learn that you are getting an honest opinion from me, and will do every time.

In reviewing everything in your financial picture – beyond simply your investments – we will build a plan to suit your unique situation, and get you on the path to real growth.

## Let's talk today.

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A disclosure statement is available, on request, and free of charge.

