



NEW ZEALAND FINANCIAL PLANNING

Helping you make smart choices with your money



“Financial planning is about gaining clarity on how you see your future”

David Carter

GradDipBusStuds, DipTchg, CFP^{CM}

There have been many changes in financial planning since David began in 1988, but what hasn't altered is the focus on personal objectives and goals. David enjoys working with his clients to clarify and define those aims, understand and assess their tolerance to risk and provide solutions designed to help them achieve those objectives. Working with his clients ultimately develops into a long-term partnership.

David is married to Andrea and both are actively involved with their families' sporting passions. Whilst David's playing days are over he coaches his eldest son's football team, is on the committee for his sons swim club and shares the taxi duties with Andrea for football, cricket, swim and surf events their boys participate in.

“We all lead busy lives and finding the time to fit everything in is a challenge. Planning makes a big difference to achieving all that we do - much like financial planning does for my clients.”

CHRISTCHURCH

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Where to find us

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You may request a full adviser disclosure statement, free of charge, by contacting any one of the above offices.

For more information on our people and services please visit our website

<http://www.invest.co.nz>

