

http://www.quartzwealth.co.nz/about_us.html

OUR STANDARDS AND CORE BELIEFS

Glenn believes:

- in acting with the highest standards and ethics for the benefit of clients.
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- that all remuneration should be transparent and disclosed up front.
- in empowering people to make the best decisions for themselves.
- in sharing financial knowledge with everyone who wants to make wise decisions about their money.
- in keeping things simple.

Ethical Standards

Ethical Standards forms the fundamental core of what we are about. We are committed to the Code of Professional Conduct for Authorised Financial Advisers as well as those of the NZ Society of Accountants and the Financial Planning Association.

Advice Model

We believe in a simple fee philosophy. Our fee schedule for advice work is based on an hourly rate, is flexible and is tailored to meet your particular needs and circumstances. This approach supports our objectivity and working in your best interests. Our fees for managing portfolios are based on the value of your investments you have invested. That way our interests are aligned in growing your wealth.

Personal

What we do is personal and customised to each and every one of our clients. Our business is based on close relationships, not on a factory sales process typical of the industry.

Integrity

We do the right thing without compromise. Integrity implies not merely honesty but fair dealing and truthfulness in all that we do.

Competence

We will endeavour to constantly increase our professional knowledge. We continuously brainstorm for improved strategies that may better help you to realise your financial goals.

Objectivity

It is very important to us to be fair, impartial and honest in all our dealings with you. We will not allow prejudice or bias, conflict of interest or influence of others to override Objectivity. It is critically important to us that we are independent.