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The  
Private  
Office

Helping you achieve  
your financial goals.



## Who we are.

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At The Private Office we look at money differently. Our focus is on managing your wealth to help you realise your life goals and live the life you want.



### Nick Crawford

Nick is a highly experienced personal wealth adviser with over 20 years' experience in the UK and New Zealand. He enjoys building strong relationships with clients and explaining financial concepts in easy to understand ways.

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### Dan Weale

Dan is an experienced financial adviser after working for more than a decade in London before emigrating to New Zealand. Dan focuses on providing comprehensive Financial and Investment Advice to a broad range of high-net worth clients, Trusts, and Charities.

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### Angela Chu

Born and raised in New Zealand, Angela has spent nine years in the Finance and Banking industry of which she has spent eight years focusing on providing Investment Advice to high-net-worth clients and Trusts. Angela has a passion for crunching numbers and looking at data.

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### Laetitia Peterson

Laetitia has over 30 years' experience in financial markets in the US, UK and New Zealand. She founded The Private Office to bring best-practice advice to the New Zealand market following the sale of her successful fund management business Liontamer to a European bank.

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### Claudia Williams

Claudia Williams brings a vast experience across the finance sector having worked in New Zealand and Australia. She holds a Bachelor of Business majoring in Accounting and Finance from Massey University. During her university years, Claudia competed on the world tennis circuit.

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### Cindy Ip

Cindy is responsible for client services and operations. She is passionate about providing excellent service to our clients. Cindy has an operations background in New Zealand and Hong Kong, including managing the registry for Smartshares.

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### Sharmin Charania

Sharmin has a diverse background in the financial services industry across various sectors, including share registry, investment banking and insurance. Sharmin values meaningful connections & quality time with family and friends.

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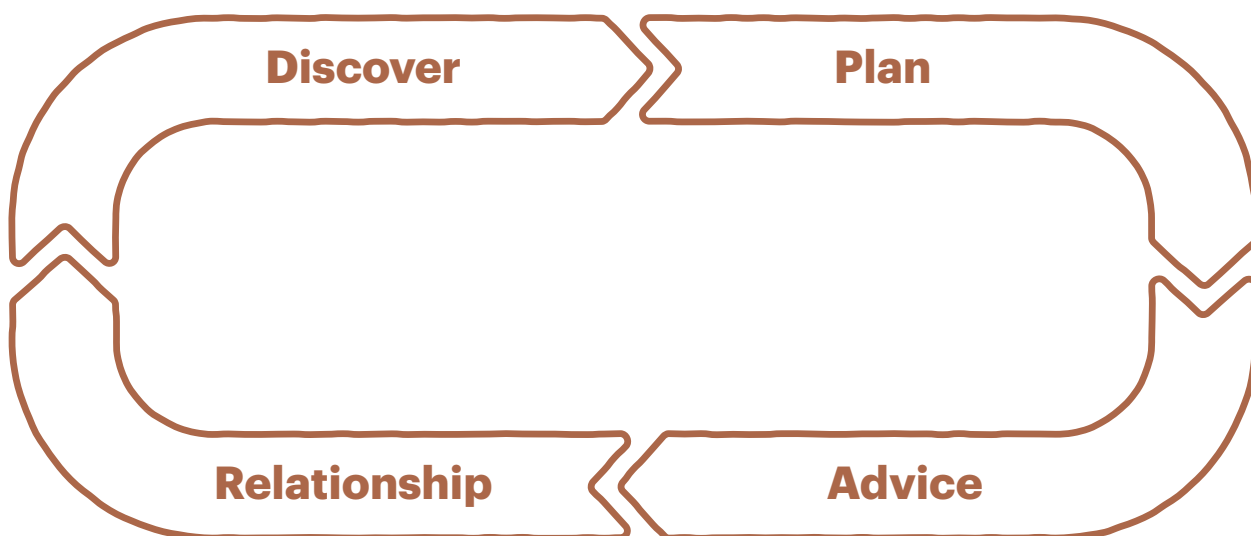
### John Atkinson

Originally from Dublin Ireland John was CEO of IOOF New Zealand Limited (previously named Plan B Wealth Management Limited). John has previously held senior roles in the FMCG and Telecommunications sectors in Europe, the Caribbean and Australia.

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## How we work.

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### 1. Discover

We gain a detailed understanding of your unique situation. We establish what is important to you, your current financial position, your objectives and any risks that might impede achieving your goals.



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### 2. Plan

We design a personalised, goals-driven financial plan. We prioritise what is most important and build confidence in achieving your objectives through detailed financial planning and cashflow modelling.



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### 3. Advice

We tailor your investment experience with a mixture of growth and defensive assets based on your risk tolerance. As your trusted adviser, we ensure you stay on track over time and achieve your financial goals.



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### 4. Relationship

We then build our relationship with you. We have regular meetings. We ensure regular rebalancing to your target strategy. We coach and help you avoid bad decisions. We make sure you achieve your goals and financial objectives by being there all the time.



## Diversification | Risk Management | Asset Allocation.

The importance of diversification cannot be overstated. With exposure to over 10,000 individual companies spread across every major investable market, our portfolios are some of the most diversified strategies available in New Zealand.



## Social responsibility.

Responsible investing is at the core of what we do. You can express your values through your investment choices and help protect the world we inhabit for future generations.



Environmentally conscious portfolios that are focused on climate change, energy emissions, waste management and resource depletion.



Ethically screened portfolios that exclude harmful industries such as factory farming, cluster munitions, child labour, tobacco and nuclear weapon systems.



Portfolios that encourage high-quality governance through shareholder voting, advocating ethical and sustainable business practices for long-term value.

## Consilium.

We work with Consilium who are known for their innovative globally recognised best-practice systems and solutions to support independent financial advisers.

Consilium's highly qualified investment committee provides institutional-quality investment management, disciplined portfolio monitoring and whole-of-market research.



### Damon O'Brien

Head of Investment Services



### Mitchell Bristow

Investment Research Lead



### Ben Brinkerhoff

Head of Advice



### Prof Ben Marshall

Independent Academic Consultant

Find out more at  
[consilium.co.nz](https://consilium.co.nz)



Consilium

## Partnering with the best.



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