CAMBRIDGE PARTNERS

FINANCIAL ADVICE | WEALTH MANAGEMENT

Helping create better futures



For You

If you are looking to find clarity in your financial life, we are here for you.

With You

We partner with you, working to understand your values, and helping you to pursue your goals and objectives.

About You

Helping you make better decisions to enhance your return on life.



Hello and welcome



When choosing a Financial Adviser, there is a lot to consider about the relationship you are entering. It should be built on trust, comfort, and a genuine understanding of your values and goals.

Our primary objective is to provide you with peace of mind; no matter how complex your situation is, we are here to help you live a fulfilling, happy, and engaged life.

Throughout the journey, the Cambridge Partners Team will be there for you, providing ongoing, holistic advice and support.

We look forward to meeting you.

James Howard
CEO and Financial Adviser



Why Cambridge Partners?

With so many things to consider when starting your investment journey, our Advisers remove any complexity so you can focus on what matters. We partner with you to find your true values, goals, and priorities and help you make better decisions to enhance your overall return on life.

Cambridge Partners is one of the largest fee-only financial advisory and wealth management practices in New Zealand.

Our advisers are non-conflicted and work solely on your behalf. Our solutions are comprehensive, holistic, and ongoing to ensure that our advice is always focused on your objectives.

We have been in business since 1994, keeping clients at the center of what we do.

How we help

Understanding the details of your life now and future ambition is the best way to create a comprehensive financial plan and investment strategy for you. We can help with:



Growing and Protecting Wealth

We understand the importance of protecting your wealth and assets to support your retirement and future generations.



Retirement Planning

Great retirements start with great retirement plans. We help you plan a financially secure and fulfilling retirement.



Women's Wealth

We empower women to take control of their financial futures, whether building wealth through their careers or navigating life transitions such as a separation or the loss of a partner.



Business Exit Planning

Whether you're selling, retiring, or transitioning ownership, we help you plan a successful exit strategy that protects your legacy and maximises financial outcomes.



Kiwisaver

We offer tailored KiwiSaver advice for individuals who want to make smart, strategic decisions around this important asset. Our approach is evidence based and strategic, helping you make the most of your KiwiSaver while laying the foundation for future financial success.



Investing for US Citizens

We help you navigate the complexity to comply with the investment landscape and tax codes of two countries simultaneously.



UK Pension and Investor Visa

For UK expats, returning Kiwis or international investors, our specialist advice can help navigate complexities and provide you with investment solutions to meet your needs.

Learn

We will meet with you to understand your current situation, what you value in life, and what you want to achieve.





Build

We then work with the information you have provided and use our expertise to create a holistic financial plan designed specifically for you, to help you achieve your goals.

Partner

When you are happy with your plan, your Adviser will set up your investment portfolio. From there we will continue to support you, update you and guide you into the future.



We also help with

- Cash Flow Modelling
- Tax Structuring
- Estate and Legacy Planning
- Risk Assessment
- Business Exit Planning
- Investor Education
- Holistic and Strategic Advice
- Navigating Life Transitions
- Ongoing Portfolio Reviews
- Planned Giving/Philanthropy

Canterbury Trusted

Cambridge Partners is proud to be recognised as a Canterbury Trusted business, a mark of integrity and excellence awarded by Business Canterbury.

This recognition reflects our commitment to responsible business practices and trusted client relationships across the region.

CANTERBURY TRUSTED™

Awarded by Business Canterbury





Contact
Cambridge Partners

We understand that taking the first step on a new path can be daunting, which is why we offer a free of charge initial meeting with someone from our advisory team.

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CAMBRIDGE PARTNERS

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