Need advice?

If you have $250,000 or more to invest and need advice, we can offer you your own dedicated Investment Adviser – a qualified professional who'll build a portfolio recommendation tailored to your investment goals, risk tolerance and timeframe.

How it works

1 ► **Meet your Investment Adviser**

You'll be matched with a dedicated Pie Investment Adviser – a qualified professional. Your adviser takes time to understand where you are and where you want to be.

2 ► **Risk profile and goals**

You'll complete a short questionnaire – typically reviewed in your first meeting – covering your investment goals, timeframes and how you feel about risk. This isn't a form for form's sake: it's the foundation your portfolio recommendation is built on.

3 ► **A tailored recommendation**

Based on your profile, your adviser recommends a diversified portfolio, harnessing a select number of Pie's investment funds and calibrated to your investment risk level. You'll receive a written Statement of Advice explaining exactly what's recommended and why.

4 ► **Portfolio implementation**

If you decide to proceed with the recommendation, your adviser will guide you through the steps needed to put your portfolio in place.

5 ► **When things change**

If your circumstances shift – a change in income, a new goal, approaching retirement, or significant market movements, for example – your adviser can take a new look at your situation and, through a separate advice engagement, recommend a different strategy, if that's appropriate.

Your adviser is a qualified financial adviser

Every Pie Investment Adviser holds the New Zealand Certificate in Financial Services (Level 5, Investment Strand) and is registered on the Financial Service Providers Register. They operate under Pie's Financial Advice Provider licence and are bound by the Code of Professional Conduct – including a duty to act in your interests.