



INVESTMENT ADVICE YOU CAN TRUST

For several years now you have managed investments for us and we would like to express our appreciation of your efforts on our behalf. Your knowledge of the financial situation both locally and internationally impresses us greatly, as do your explanations of the finer points of Investment markets. The guidance you have given us has enabled our funds to grow in a very satisfactory manner. You are very prompt and readily available to a request or query from us for which we also say a big thank you".

Ian and Noelle 3rd August 2018

If you would like a free first appointment with Allan or would like more information about his services -

Phone **0800 756 886** or email allan@ploutos.co.nz



**Retired Chartered Accountant
and his wife Noelle**

ARE LOW INTEREST RATES HURTING YOUR RETIREMENT OR INVESTMENT PLANS? ARE YOU UNSURE ABOUT WHAT TO DO WITH YOUR INVESTMENT FUNDS TO ACHIEVE A HIGHER RETURN?

Allan Williams is an Authorised Financial Adviser(AFA) with over 30 years experience.

Allan states "I regard the funds that I advise on as more than just investment in a portfolio. My clients funds represent the savings, sacrifices and dreams they have entrusted in me." I take this responsibility seriously.

To receive a free brochure or book a free initial appointment, email Allan on allan@ploutos.co.nz or phone 0800 756 886

Allan's disclosure statement is available free of charge by emailing allan@ploutos.co.nz

FUND MANAGEMENT COSTS

Source: Average NZ allocation fund is the equal weighted average of the management fee quoted on Morningstar for 2017 open-ended, allocation category, non-kiwiSaver funds available for investment in New Zealand as at 13/5/2019. Consilium portfolio based on 50% growth and 50% income.

1.20%

**AVERAGE NZ
ALLOCATION
FUND**

0.39%

**OUR
PORTFOLIO**



Allan's disclosure document is available free of charge at www.ploutos.nz

ALLAN WILLIAMS **0800 756 886 / 021 980614**

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