

PROFILE 2023

Welcome





All of us at Hobson Wealth, look forward to working with you and helping you achieve your financial goals.

Warren

Warren Couillault — CEO

WHY US?

TWO UNIQUE FEATURES SET US APART FROM OTHERS

All we do is look after you, your savings, investment and wealth requirements: no big corporate clients, no funds managers, just you.

The key people in our business own the business: we're not part of a big conglomerate – it's us, Kiwi owned and operated.

AND THAT'S THE WAY WE WILL ALWAYS BE



Hobson Wealth is arguably New Zealand's leading specialist investment advisory group. We have teams of private wealth advisers in Auckland, Tauranga, Wellington and Christchurch.

EXPERIENCE

Our executive management team and senior advisers literally have hundreds of years of collective experience in financial markets. We've been through many notable market events, from the share market boom and subsequent crash in 1987, to the tech-wreck in the early 2000s, the GFC in 2008, the following ten-year bull market and of course the coronavirus crash of 2020. We utilise this vast experience to stay on top of every aspect of your investment objectives.

We're Kiwi owned and operated: Warren Couillault, CEO, is the major shareholder of Hobson Wealth. Key team members in advisory, investments and operations are all shareholders.

Hobson Wealth enjoys a strategic relationship with the Macquarie Group.

OUR SERVICES

INVESTMENT SERVICES

HOBSON WEALTH PORTFOLIO SERVICE

- PREMIUM PORTFOLIO
- CUSTOM PORTFOLIO
- SELF-MANAGED
- EXECUTION-ONLY

NAVIGATOR

KIWISAVER

INVESTING FOR

- RETIREMENT
- CHARITIES & TRUSTS
- NEW IMMIGRANTS

ACROSS OUR TEAM WE HAVE

35 NZX

ACCREDITED ADVISERS



AKL—CHC TRG—WLG



Hobson Wealth is named in recognition of Captain William Hobson.

Hobson Wealth embodies the same pioneering spirit, diligence and visionary leadership of New Zealand's first Governor.



100 YEARS

OUR INVESTMENT TEAM IS ONE OF THE MOST EXPERIENCED IN NEW ZEALAND



I'm committed to helping you achieve your savings and investment objectives.

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Warren Couillault



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Kirsty has provided exemplary service to both my wife and I for probably 30 years or more. We have been very pleased with the services provided by Hobson Wealth.

OO ELIZABETH AND CHARLES SPEIGHT

INVESTMENT SERVICES

PORTFOLIO SERVICE

PREMIUM PORTFOLIO

Financial planning, assessment of your goals and objectives, portfolio management, comprehensive monitoring, administration and reporting.

With our Premium Portfolio Service, we create an investment strategy tailored just for you, based on your long-term goals, financial situation and your approach to and understanding of different ways of investing. We take into account "the whole picture" and work closely with you to formulate a strategy and investment parameters to shape your portfolio.

The Premium Portfolio Service comes with full administration of all contributions, withdrawals, income payments and detailed reporting.

CUSTOM PORTFOLIO

Portfolio management, comprehensive monitoring, administration and reporting, managed to a client-specified mandate.

With our Custom Portfolio Service, we provide advice to you based on the investment strategy you have selected. We don't specifically take account of your overall financial situation, needs and goals rather we focus solely on the investment strategy you have determined you require from us while acknowledging you have other investment assets.

For example, you may simply want us to advise you on a portfolio of New Zealand shares while you have other investments which you look after yourself, e.g. commercial property.

The Custom Portfolio Service comes with full administration of all contributions, withdrawals, income payments and detailed reporting.



DISCRETIONARY INVESTMENT MANAGEMENT SERVICE (DIMS)*

We offer an extension to our Premium and Custom Services: Discretionary Investment Management Service (DIMS). With the DIMS extension Hobson Wealth and your adviser will undertake all the day-to-day decision-making regarding the investments within your portfolio. Many prefer this additional service as it provides hassle-free investment management accessing the very best of your Hobson Wealth team.

SUMMARY OF SERVICES

Service	Investment Planning	Investment Advice	Full Admin and Custody	⊕ DIMS
PREMIUM	~	~	~	/
сиѕтом		~	~	/
SELF-MANAGED		~	~	
EXECUTION-ONLY			~	
NAVIGATOR	~	~	~	
KIWISAVER**	~	~	~	

SELF-MANAGED

Point in time advice based on your specifications, administration and reporting available.

The Self-managed Service allows you to supplement your own investment decisions with access to a Financial Adviser for investment ideas, as and when you choose.

For example, you may be particularly interested in the bond market and have instructed us to provide you investment ideas regarding bonds only.

The Self-managed Service comes with optional administration of contributions, withdrawals, income payments and detailed reporting.

EXECUTION-ONLY

We buy and sell securities on your instructions.

Under this service we will execute transactions for you in line with specific instructions you provide us.

The Execution-only Service comes with optional administration of contributions, withdrawals, income payments and detailed reporting.

^{*} Wholesale Investor Service **Via our partner kōura wealth

INVESTMENT SERVICES

INVESTING FOR

NAVIGATOR



It's sometimes difficult to access a full premium advice service if you don't have millions to invest. That's why we established the Navigator Service: a full-service solution for those with anything from \$50k - \$500k to invest.

The Navigator Service determines the particular combination of our three in-house managed funds that is appropriate for you, your circumstances and investment objectives. That's it!

A one-stop shop for all your asset allocation and securities selection. You of course have full investment administration included in the Navigator Service along with as much access to your adviser as you would like, online access to your investments, regular reporting etc.

KIWISAVER



We partner with koura wealth who will help with establishing the right portfolio for you and your circumstances including your age and stage, income, investment as well as your approach to retirement and other lifestyle objectives.

KIWISAVER PARTNER



INVESTMENT ADMINISTRATION

Our wholly owned subsidiary, Hobson Wealth Custodian, undertakes all your investment administration. This service is a convenient way to process all your dividend, fees and interest income. We of course keep track of all your transactions, contributions and/or withdrawals and you have online access to this and your current portfolio valuation.

Our investment administration service also enables your adviser to have a clear picture of your investment assets at all times meaning he or she can respond quickly as opportunities arise.

RETIREMENT

It's never too early or too late to start planning for your retirement. And whatever stage you're at today, we can help you make the right investments for life after work.

Most of us appreciate how important it is to plan for retirement. But it can also be difficult to figure out the best way to make it happen. Working with one of our advisers might be the best decision you make. They will help you develop a retirement plan that makes the most of your income today, depending on where you are now, and what your goals are for the future.

CHARITIES & TRUSTS

Managing a family trust or large charity often means working with complex investments. Our advisers have the expertise and experience to support you through that process, and can tailor a solution that uniquely fits your needs.

We work extensively with trustees, creating investment solutions that deliver against their Statement of Investment Principles and Objectives (SIPO), and other investment guidelines, while using a set of unique investment analysis tools.

We have an in-depth understanding of the specific risk profiles that apply to different types of trusts, and can help you consider other details like the liabilities of the trust, your tax status and return requirements that are adjusted for inflation.

NEW MIGRANTS

If you are immigrating to New Zealand, our local advisers can help you understand how to invest most effectively.

With our expertise, experience and close industry connections, we will make your financial move as seamless as it can be.

We will not only help you transfer your assets, we'll also show you how to make the most of them once they're here. Our investment advice also extends to those immigrating under Investor/Investor Plus migrant categories.

No matter where you are coming from, we can help you navigate the considerations that apply to your investments — and refer you on to tax experts where needed. And if you're transferring a pension from the UK, we'll guide you through the process of selecting a New Zealand Qualifying Recognised Overseas Pension Scheme (QROPS).

Their investment strategies and ability to understand the market gives me 100% trust in the direction we are going not to mention the returns have been outstanding. I have and will continue to recommend them for those seeking to grow their wealth.



RICHARD KAHUI – CLIENT SINCE 2005

OUR INVESTMENT TEAM



The Hobson Wealth Investment Team takes research input from our partners Macquarie and Citigroup and develops investment strategies and ideas for all our investment advisers as well as the Hobson Wealth Navigator Service.

SIMON ROBERTSON Head of Investments

Simon heads up our Investments Team and has 27 years of financial markets experience on three continents. Previous roles include; 15 years at UBS in Hong Kong, four years at Goldman Sachs in New York and more recently the CIO of the Pactiv (Rank Group) US\$4.6bn Defined Benefit Pension Plan. Simon oversees our macro views / asset allocation and is also responsible for our international growth securities selection.

ED GLENNIE Investment Strategist

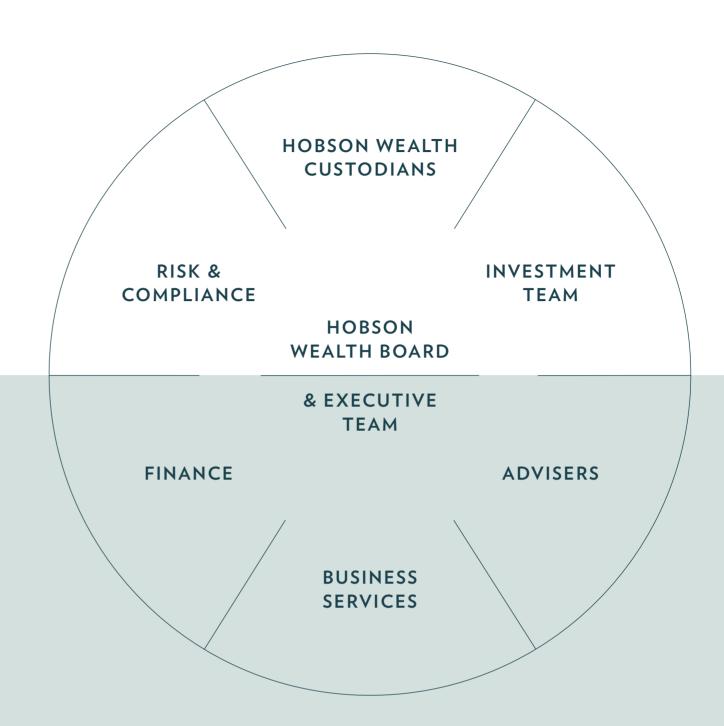
Ed is responsible for developing investment strategies for our advisers. He provides consultation around portfolio construction and implementation utilising the firm's substantial local and global research capabilities. Ed has 24 years of experience in financial markets. Prior to joining Hobson, he was ten years in Hong Kong where he was Head of Asian Research for Lighthouse Investment Partners, a global fund manager.

JAMES CAUGHEY Head of Fixed Income

James joined the Hobson Wealth Investments team in early 2023. He looks after all-things fixed income but also assists with macro, strategy and equities where applicable. Prior to joining, James spent more than 10 years with New Zealand Asset Management (now Alvarium) in roles covering strategic asset allocation, manager research and portfolio and fund construction.

CHARLES BARTY Junior Equity Analyst

Charles has been at Hobson Wealth for one year, after graduating with a Bachelor of Engineering BE(Hons) from the University of Canterbury. Charles is a passionate investor and has strong problem-solving skills, as well as knowledge in conducting investment research and generating recommendations.



HOBSON WEALTH TEAM STRUCTURE

HOBSON WEALTH BOARD & EXECUTIVE TEAM

Warren Couillault chairs the board and is joined by five directors. The board meets at least eight times each year and is responsible for determining the strategic direction of Hobson Wealth.

RISK & COMPLIANCE

Our Risk and Compliance Team ensures best practise legal and regulatory management across Hobson Wealth.

HOBSON WEALTH CUSTODIANS

Undertake all of the investment administration, administering on behalf of client assets/securities such as shares, bonds, foreign currency and cash, both in New Zealand and overseas.

INVESTMENT TEAM

The Hobson Wealth Investment
Committee and Investment Team is
considerably experienced with 100
years' experience between them. They
meet regularly to develop strategies and
models based on industry research.

BUSINESS SERVICES

Comprises Office Management, Broker Services, Dealers, Adviser Support and Onboarding staff. Ensuring the smooth day-to-day operation of Hobson Wealth.

ADVISERS

Hobson Wealth's team of 35 advisers is one of the most experienced in the business and will help create a tailored investment plan for you.

FINANCE

Our team in finance include our Chief Financial Officer, Operational Finance Manager and Financial Accountants. Speak to one of our experts about a free consultation on 0800 742 737, email us at info@hobsonwealth.co.nz or contact us at one of our regional offices.



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Hobson Wealth Partners Limited (Hobson Wealth) (FSP29782), is an NZX Trading and Advising Participant, an Individual Clearing and Depository Participant, and a registered financial services provider (L4, Australis Nathan Building, 37 Galway Street, Britomart, Auckland New Zealand) and has a licence issued by the Financial Markets Authority to provide financial advice. Disclosure statements for Hobson Wealth advisers are available free of charge by contacting us on 0800 742 737.