IWIinvestor
Pou Tiaki i Ngā Rawa
New Zealand's wealth advisers

How it works

1	**Meet**	Initial meeting to discuss your investment needs and to determine which of our services would be best for you. We establish your goals and how much risk you want or need to take.
2	**Gather information**	There may be more meetings with you or your board to gather your attitude towards risk, your financial situation and other data needed to produce our recommendations.
3	**Analyse**	We look at a variety of factors to determine the best investment strategy to meet your goals such as your timeframe, your goals and your risk profile.
4	**Recommend**	We will present our recommendations which will include how to invest, which funds to invest in, and our forecasts for the outcome of your portfolio.
5	**Implement**	We implement our recommendations by creating an online investment account, you deposit your funds, and we buy the recommended investments.
6	**Review**	You receive regular reports, and we review your portfolio regularly. We monitor the performance of all aspects of your investment continuously.