



## Jack Powell

**"After 15 years as an adviser I take my role as the trusted adviser of my client's life savings very seriously. I work very hard to not only meet the client's expectations, but also limit the overall volatility within my clients customised investment portfolios."**

Hello, my name is Jack and I have been working in my role as a Private Investment Adviser within Westpac since 2008. In addition to this, I have over 14 years experience working for major New Zealand financial institutions and have also owned my own financial planning business.

I am a member of the Institute of Financial Advisers, and have achieved both the Certified Financial Planner<sup>CM</sup> and Chartered Life Underwriter (CLU) designation.

I am currently studying Psychology in my spare time, as I find that a better understanding of client and market psychology, better assists me in understanding how best to manage my clients investments.

I'd like to meet with you to give me a chance to better understand your investment goals, and design a personalised investment programme to best meet these goals.



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**Jack Powell**  
Private Investment Adviser

Disclosure Statements for Westpac Investment Advisers are available on request and free of charge from any Westpac Investment Adviser.

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