

Milford Private Wealth



Our most comprehensive service which brings together experienced professionals who specialise in working with individuals, family trusts, charities and institutions with \$500,000 or more to invest

MILFORD
PRIVATE WEALTH

milfordasset.com

Invested in expert advice and personal service



Milford was formed in 2003 by an experienced group of individuals who recognised the need for an investment company that provides New Zealanders with a world-class investment partner they can trust

Today, the Milford team comprises more than 100 passionate and talented individuals who share the common purpose of delivering the best results for our clients. By drawing on the team's depth and diversity of experience, we work together to make insightful investment decisions on our client's behalf.

Our active approach to investing gives us the flexibility to take advantage of opportunities as they arise and manage risk along the way. We also invest in the same funds as our clients, so you know we are motivated to see you do well, because we are on the same journey as you.



A trusted investment partner



Expertly managed investment funds



Security & peace of mind



Full transparency

Whether you are saving for your future, building a legacy of wealth for your family or looking to utilise your nest egg to generate a retirement income, our Financial Advisers are here to help guide you towards realising your goal.

Receive a personalised investment plan and ongoing advice from your personal Financial Adviser, with a portfolio of Milford funds designed to help you meet your financial goals.

We manage and make tactical adjustments to your portfolio on your behalf, with regular reviews to ensure your portfolio continues to suit to your situation as it changes over time.

Award-winning products & service

Zenith FundSource Awards Fund Manager of the Year 2019

INFINZ NZ Equity Manager of the Year 2010, 2011, 2012, 2013, 2014 and 2019

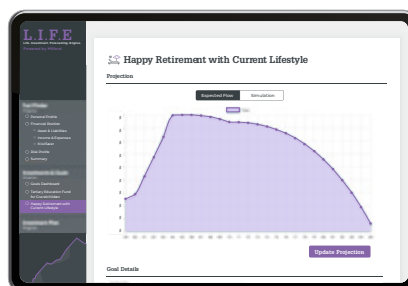
Consumer NZ People's Choice Award Winner 2018, 2019, 2020 and 2021 - KiwiSaver

Morningstar New Zealand Fund Manager of the Year 2013 and 2021, and KiwiSaver Category Winner 2013, 2014, 2016, 2018 and 2019

FundSource Awards KiwiSaver Manager of the Year 2016, 2017 and 2018

Tools to help you plan ahead

Using our Lifestyle Investment Forecasting Engine (L.I.F.E) we will help you to create and assess the viability of your goals, taking into account your appetite and capacity for risk.



If you would like to know more about our Private Wealth services, please call us on 0800 662 347.

All investment proposals are provided free of charge and with no obligation.

milfordasset.com



Past performance is not a reliable indicator of future performance. Please read the relevant Milford Product Disclosure Statement as issued by Milford Funds Ltd at milfordasset.com. You may wish to seek financial advice. The Disclosure Statements for all Milford Financial Advisers are available for free on request. See our Financial Advice Disclosure Statement at milfordasset.com/getting-advice.