

Media alert
23 June, 2020

National Capital KiwiSaver Advisory Firm Appoints Head of Advice Logic

National Capital - New Zealand's first financial advisory firm providing digitally generated, personalised KiwiSaver advice has announced the appointment of James McKelvie as Head of Advice Logic.

Prior to joining National Capital, McKelvie, an Authorised Financial Adviser, worked for Findex New Zealand where he gained experience advising high net worth families and trusts on creating long term, generational wealth management strategies.

Clive Fernandes, Director of National Capital, says, "We bring sophisticated retirement advice to all Kiwis, irrespective of what their asset base is. James will play a pivotal role in helping National Capital reach its goal of helping 1 million Kiwis become financially secure through the continual refinement of our advice logic to ensure it reflects the best practices and insights from local and international research.

"James' expertise will allow us to improve retirement outcomes for National Capital clients and help optimise KiwiSaver, which is soon becoming the largest retirement asset for many Kiwis," said Clive

McKelvie will play a crucial role in the design and delivery of personalised KiwiSaver advice to Kiwis. His role will focus on developing the financial strategy underlying the KiwiSaver advice provided, continually refining & improving the advice logic to ensure better retirement outcomes.

McKelvie holds a Master's degree in Applied Finance from Auckland University of Technology.

On his new role, McKelvie says, "National Capital has identified a way to bridge the advice gap between New Zealanders and their KiwiSaver accounts. I look forward to working with Clive and the team to develop advice logic that can be digitised to deliver personalised advice on a large scale."

At almost \$60 billion, KiwiSaver is the largest retirement investment for most Kiwis. However, many Kiwis struggle to get good advice to ensure their retirement goals can be met with KiwiSaver. National Capital offers free digital KiwiSaver advice with a focus on good client outcomes to help solve that problem.

For more information on National Capital or to take the first step in retirement planning, visit nationalcapital.co.nz.

ENDS

About National Capital

National Capital is a financial advisory firm based in Auckland, New Zealand that provides personalised investment advice to its clients. Our mission is to help one million Kiwis become financially secure using technology and the principles of pūataata (transparency), tikanga (ethics) and taurikura (prosperity).

Contact:

Fleur Mealing | Adhesive PR | fleur.mealing@adhesivepr.nz