

# ABOUT US



## THE STRUCTURE OF OUR BUSINESS

This document provides an overview of key elements of the business.  
The business is a Company, called **Wisdom8- Wisdom Management Limited**.  
It was established in 2005.  
We are a member of the dealer group, **mySolutions**.  
Our **FSP** number is **FSP36983**.  
**Wisdom8 (Wisdom Management Ltd FSP 36983) holds a full Class 2 Licence issued by the Financial Markets Authority on 1 April 2022.**

The main office is at **Level 1, 25 Teed Street, Newmarket, Auckland 1023, New Zealand**.  
Phone: 0800 Wisdom / 09 300 6011  
Email: [info@wisdom8.co.nz](mailto:info@wisdom8.co.nz)  
Website: [wisdom8.co.nz](http://wisdom8.co.nz)

## BUSINESS OWNERSHIP

The business is owned by Maggie Mei-Hui Chen.  
The directors are Rico Xin Liu and Maggie Mei-Hui Chen.

## BUSINESS INFORMATION

The business provides financial advice through financial advisers. It has 2 advisers.  
We currently have approximately 2,000 clients in 2022.

There are presently 3 people working in the business, their roles and responsibilities:

Name	Role/Job Title	Location	Key responsibilities
Rico Xin Liu	Director HR/IT	Newmarket	<ul style="list-style-type: none"><li>Business Operation</li><li>Human Resource</li><li>IT support</li></ul>
Maggie Mei-Hui Chen	Director Financial Adviser FSP104728	Newmarket	<ul style="list-style-type: none"><li>Provide financial advice to Client</li><li>Relationship with existing clients</li></ul>
Evelyn Lingyue Zheng	Salary employee Financial Adviser FSP617029	Newmarket	<ul style="list-style-type: none"><li>Provide financial advice to Client</li><li>Relationship with existing clients</li></ul>

We offer financial advice on the following product types:

Product type	Approx Percent revenue
Life, Trauma, Disability, Income Protection and Health insurances	100%

- ▶ We get paid for our services through Commission.
- ▶ We do not handle client money directly.
- ▶ Here is a description of our usual types of clients:
  - 98% Clients form Chinese community.
  - 95% Face to Face meeting,
  - 5% or less Clients through Email, Phone Call and WeChat/Line.
  - 25% of Small business owner
  - 75% Young families and Second generation of immigration.
- ▶ We engage with our clients in the following ways:
  - ✓ Face to face ✓ Phone ✓ Email ✓ WeChat, Line, WhatsApp
  - ✓ Zoom meeting if needed

## PRIVACY STATEMENT

1. It is understood that any information gathered for this needs analysis is personal and I undertake to keep this information confidential and secure.
2. The Privacy Act 2020 gives you the right to request access to and correction of your personal information.
3. Information provided by you or any authorized agent, will be used by me and any members of my staff for the purpose of providing advice to you and may also be any:
  1. product or service provider when implementing any of my/our recommendations or variations thereof.
  2. compliance advisers, assessors or by any claims investigators who may need access to such information; and
  3. other professionals such as solicitors, accountants, finance brokers, financial planners when such services are required to complement this advice and as requested by you.
4. The information will be held by me/us at the advisers' office address detailed on the previous page and may be in paper format and/or electronic files and/or may be held remotely in secure electronic storage systems.

You have the right to ask for a copy of any personal information we hold about you, and to ask for it to be corrected if you think it is wrong. If you'd like to ask for a copy of your information, or to have it corrected, please contact us at [info@wisdom8.co.nz](mailto:info@wisdom8.co.nz), or 09-3006011, or PO Box 99537, Newmarket, Auckland 1149, New Zealand.