

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
Website: 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 3,000 clients in 2026. 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">Business OperationHuman ResourceIT support |
| Maggie Mei-Hui Chen | Director Financial Adviser FSP104728 | Newmarket | <ul style="list-style-type: none">Provide financial advice to clientRelationship with existing clients |
| Eva Yi-Shiuan Tsai | Financial Adviser FSP1006401 | Newmarket | <ul style="list-style-type: none">Provide financial advice to clientAdviser Support of Maggie ChenClient ServicesClaim ProcessNew Business Process follow upRelationship with existing clientsUpload compliance documentsPrepare quotes in company portalsMaintain good rapport with clients |

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. Purpose and Collection of Information

We collect personal information about you, including details regarding your financial situation, goals, and personal circumstances, for the primary purpose of providing financial advice and related services, and to meet our legal and regulatory obligations.

We may collect this information:

- **Directly from you**
- **From third parties**, such as insurers, claim assessors, underwriters, and referrers, where necessary to provide our services. Please refer to our [Agent and Third Party Schedule](#) for detailed information.

The information we collect may include identity details, contact details, health and financial information.

2. Disclosure of Information

We may share your information with the following parties:

- **Product or service providers** when implementing any of my/our recommendations or variations thereof.
- **Compliance, audit, and IT service providers** from time to time as required to meet our regulatory and licensing obligations
- **Other professionals such as solicitors, accountants, finance brokers, financial planners** when such services are required to complement this advice and as requested by you.

3. Storage and Security

Your information will be held at our office or in secure electronic storage systems, which may include third-party systems located overseas. They are contractually bound to protect your information. Records will be retained for a minimum of 7 years to meet regulatory requirements.

4. Legal Basis

Some information is required to be collected under New Zealand law, including obligations under the Financial Markets Conduct Act 2013 and Anti-Money Laundering and Countering Financing of Terrorism Act 2009.

5. Your Rights

Under the Privacy Act 2020, you have the right to request access to, and correction of, your personal information at any time. If you would like to exercise these rights, please contact us.

Specific Notification

On those occasions when we obtain private or confidential information from a third party we will:

- Explicitly name the source of information
- Describe types of data or information received
- Clearly advise what our specific purpose is
- Identify other potential recipients
- Obtain your acknowledgement and consent