Your wealth, our priority

► KiwiSaver ► Investment Funds ► Wealth

"Bespoke wealth advice to help you create the life you want."

Mike Taylor
Founder and Chief Investment Officer

Our story

Mike Taylor founded Pie Funds back in 2007 and since that time we have created a brand separate and distinct from the styles of most fund managers. Our goal is to focus first and foremost on client returns, and to provide investors with outstanding client service.

Unique Approach to Funds Management

We offer our investors a unique approach to funds management, and believe this sets us apart from the rest.

Launch of Pie Wealth

When we launched our Pie Wealth offering in April 2018 we had the same goal in mind. The service was created because we had clients approaching us and asking for advice on investment suitability, risk tolerance and how our funds would assist them with their goals. Our Wealth proposition aligns with this, and provides ongoing investment advice on a range of products, including those not offered by Pie Funds.

Tailored Recommendations

Each client is unique, and our recommendations are tailored to their goals, circumstances and risk profile. Knowing this, our Wealth Advisers will guide you through the different stages of life, whether it's growing your wealth, providing an income or safeguarding your capital in retirement.

Success Defined by Personalization

Success at Pie Wealth is not defined by how big we get. In fact, we don't want to be the biggest, providing a highly personalised offering for each of our clients is our priority and therefore staying true to Pie Funds philosophy.

Long-Term Partnership

Ultimately, our goal is to partner with our clients over the long term, navigating the ups and downs of markets, the different stages of life, which many of course which will be significant, and to see you reach your financial and personal goals, whatever they may look like.

We look forward to talking with you, and sharing more about how we can partner with you.

Michelle Lopez
Head of Australasian Equities and Portfolio Manager (AU)

Mike Taylor
Founder and Chief Investment Officer (NZ)

Guy Thornewill
Head of Global Research (UK)

Ana-Marie Lockyer
CEO and Board Director

Why Pie Wealth

You will hear us talk about this a lot across our team, that the Pie Wealth experience is founded on a personalised relationship.

Unique Needs and Goals

What we have learnt over the years is that your needs and goals are unique. Everyone has their own story and there are no two stories exactly alike, so getting to know our clients and their uniqueness is something we place a real emphasis on.

Focused Client Attention

For our Wealth Advisers to do their best possible job and to really know our clients, you can't be just another number. So, we're really intentional about restricting the number of clients our Wealth Advisers manage – ensuring you get the focus and attention you deserve.

Individual Relationships and Team Collaboration

While the individual relationship is at the heart of our offering, collaboration is a core part of how we operate as a team. The sharing of ideas, learnings, and insights we take from clients, oversight from our investment committee, all help in making sure we provide our clients with the best possible solutions and overall experience.

Independent and Diversified Investments

To create further personalisation, our proposition is not restricted to our own investment products here at Pie. We also include a range of external investments, both passive and active, which we believe complement our in-house expertise. This creates a level of independence, allows us to build portfolios that are sensibly diversified across the key asset classes, and tailored to your situation.

Simon Hepple
Wealth Adviser

Mark Bull
Wealth Adviser

Our approach to advice

Personalised wealth management

Pie Wealth provides ongoing investment advice on a range of products, including some that are not issued or managed by Pie Funds. Each client is unique and our recommendations are tailored to your goals, circumstances and risk profile.

- Our Wealth Advisers will guide you through the different stages of life, whether it's growing your wealth, providing an income or safeguarding your capital in retirement.
- The advice process is designed to make sure your portfolio aligns itself with your circumstances, risk profile, and your goals. Getting you invested appropriately is a key focus for us, but it doesn't stop there.
- The advice we provide is ongoing. Review and rebalancing processes are an essential part of our offering. This helps ensure the advice provided continues to meet your objectives and goals over time.
- Disclosure statements from our Wealth Advisors are available on request, free of charge.

James Paterson
Chief Client Officer

What's included

- A written Statement of Advice on how to achieve your financial goals.
- Access to Pie Investment Funds and other investment products.
- Personalised investment advice and regular meetings with your Wealth Adviser.
- An online portfolio platform to view your investments at any time.
- Full administration and independent custody of your holdings (i.e. your money is not held with Pie directly).
- Monthly fund updates.
- Semi-annual reports and annual tax report.
- Invitations to client events.

PieWealth
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