



## **Certus Financial Group**

### **WealthView Quarterly Newsletter**

April 2017

The first quarter of the 2017 year produced strong returns for all types of portfolio's after the financial markets rebounded from the US Election result in November 2016.

Fixed Interest Funds, NZ Shares and in particular Global Sharemarkets performed strongly during January, February and March. The US Dollar also strengthened over the last 2-3 months which has had a small positive impact on investment portfolio's.

#### **AMP Capital Income Generator Fund and Fixed Interest Fund options**

If you have additional Cash or Term Deposit funds available, there are some very good Fixed Interest Fund options available as well as the AMP Capital Income Generator Fund which could be of interest to you.

The AMP Capital Income Generator Fund produces regular income streams which are payable on a monthly basis and has the opportunity for capital gains. The AMP Fund is also very liquid, you can buy/sell out of the fund in three working days.

Please click [here](#) to read more information.

#### **2017 Tax Reports**

Please note that the 2017 WealthView Tax Reports will be directly sent to your postal address on approximately 20 - 25 May 2017.

If you have any questions regarding your Tax Report, please feel free to contact Brendon White.

## AMP Awards

At the AMP Awards on 17 March 2017, AMP formally acknowledged some of the standout individual and business achievements of Advisers and Businesses in 2016.

Brendon White, Director of Certus Financial Group, was named AMP Adviser of the Year plus AMP WealthView Management Sales Champion. Certus Financial Group received AMP Adviser Business of the Year honours - each for the third consecutive year.

"Brendon and the Certus Financial Group team lead the way in building a more robust profession and continue to raise the bar for the industry through their conduct, professionalism and commitment to help their customers realise their financial goals - and that's more important today than it's ever been," Managing Director of AMP Blair Vernon said.

If you have any questions regarding your WealthView portfolio, please contact Brendon White on 09 365 5904 or email [brendon.white@amp.co.nz](mailto:brendon.white@amp.co.nz). If you have any administration questions, please contact Lauren Yardley on 09 377 0951 or [lauren@certusnz.co.nz](mailto:lauren@certusnz.co.nz)

Kind regards

Brendon White and Lauren Yardley