



INVESTING IN  
NEW ZEALAND

NEW ZEALAND ACTIVE  
INVESTOR PLUS VISA

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New Zealand's Active Investor Plus visa offers migrant investors and their families the opportunity to live and invest in New Zealand.

ANZ Private is uniquely placed to help. We have extensive experience of helping migrant investors and their families through the visa application process. We work closely with Immigration New Zealand and New Zealand Trade & Enterprise in supporting migrant investors – this enables us to make the process simpler, faster and easier.

We can assist you to meet the requirements of the Active Investor Plus migrant visa through implementing a portfolio of New Zealand listed equities. As New Zealand's largest bank, we can connect you to a wealth of investment opportunities including direct business investment, private equity, venture capital funds and philanthropic organisations.

We can also work with you to meet all your financial needs in New Zealand. From opening a New Zealand bank account from overseas, to buying a home once residency is granted, and helping you and your family achieve your individual ambitions. We offer a complete, highly personalised service.





# ACTIVE INVESTOR PLUS VISA KEY INFORMATION

The Active Investor Plus visa is designed to encourage skilled, experienced investors to invest directly in New Zealand businesses and help them succeed on the world stage. The table below outlines the key requirements.

<b>Acceptable investments and minimum investment funds</b>	<p>Minimum investment of NZ\$5 – 15 million, depending on the mix of investments. Acceptable investments carry different weightings toward the NZD \$15 million investment threshold. You can invest in a combination of these.</p> <p><b>A weighting system applies:</b></p> <ul style="list-style-type: none"><li>• Direct investments: 3x weighting. Example: NZ\$5m in direct investments</li><li>• Managed funds e.g. private equity or venture capital funds: 2x weighting. Example: NZ\$7.5m in venture capital funds OR NZ\$5m in private equity AND NZ\$5m in listed equities</li><li>• Listed equities (capped at 50%): 1x weighting. Example: NZ\$7.5m in listed equities AND NZ\$7.5m in philanthropy OR NZ\$7.5m in listed equities AND NZ\$2.5m in direct investments</li><li>• Philanthropy (capped at 50%): 1x weighting. Example: NZ\$7.5m in philanthropy AND NZ\$7.5m in listed equities OR NZ\$7.5m in philanthropy AND NZ\$3.75m in managed funds.</li></ul>
<b>Investment timeframe</b>	<ul style="list-style-type: none"><li>• 100% of the investments must be completed over a three-year time period, with 50% of the investments completed within 18 months</li><li>• Must be maintained up to the end of the fourth year.</li></ul>
<b>Minimum time spent in New Zealand</b>	<ul style="list-style-type: none"><li>• Must spend at least 117 days in New Zealand over the four year investment period (around 1 month per year).</li></ul>
<b>Language requirements</b>	<ul style="list-style-type: none"><li>• Speak, read, write and understand English to at least Level 5 under the International English Language Testing System or equivalent.</li></ul>

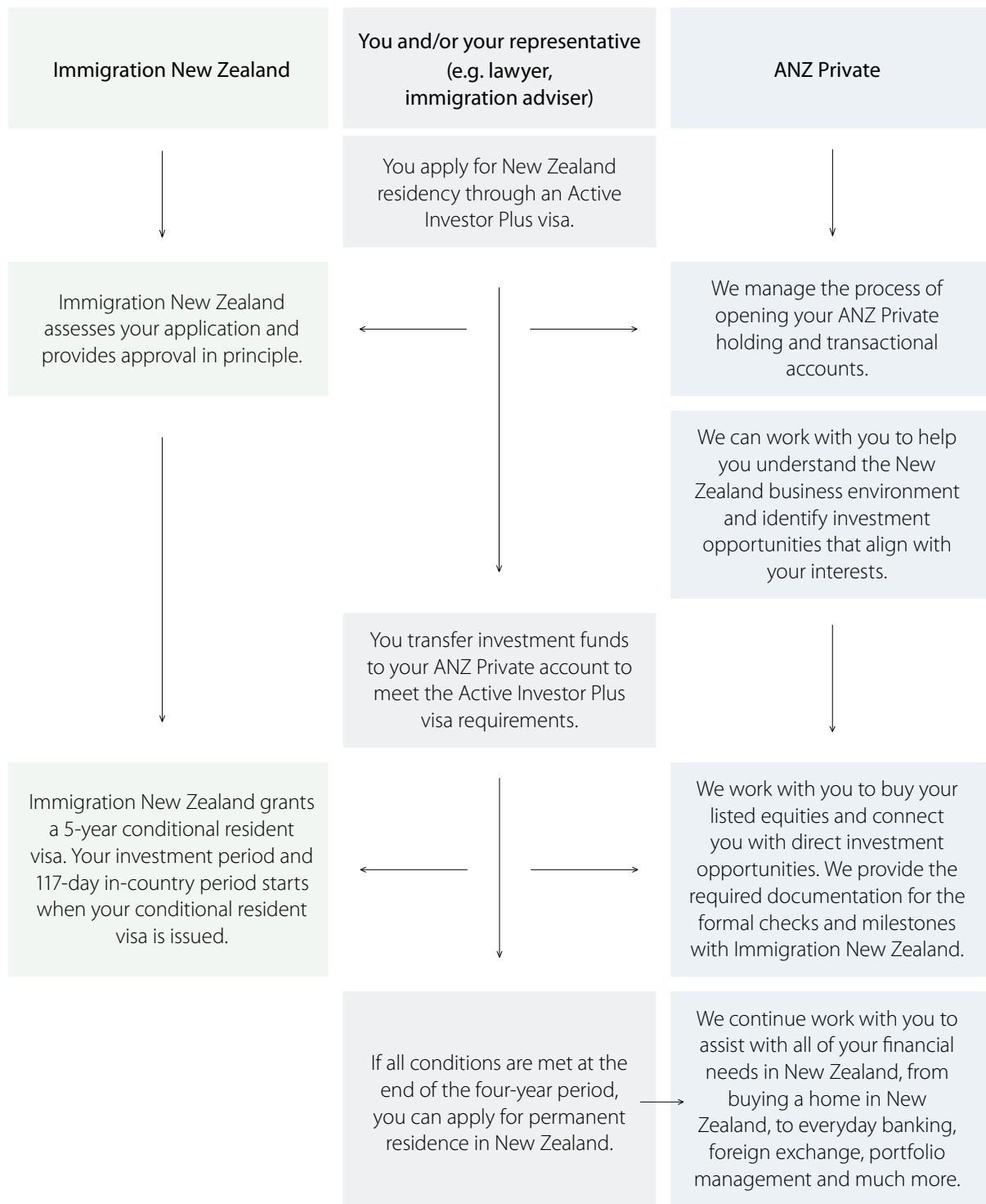
# HOW ANZ PRIVATE CAN HELP



## Facilitating the visa application process

We will work with you, Immigration New Zealand and your representative to help you meet the requirements for an Active Investor Plus visa. Our deep understanding of the process can help ensure you meet Immigration New Zealand investment requirements. And whatever your investment focus may be, we can connect you with opportunities across all sectors of the New Zealand economy.

Here's an overview of the process and how ANZ Private can assist:







### Opening a New Zealand bank account from overseas

ANZ Private can help you open a New Zealand bank account while still overseas - making the process of applying for a Migrant Investor visa, and arranging your finances here much easier. Simply provide copies of the necessary documents (such as your passport and proof of identity) and we'll manage the rest. Your account will be fully operational before you arrive in New Zealand. To start your bank account opening process, email us at [privatebanking enquiry@anz.com](mailto:privatebanking enquiry@anz.com).



### Connecting you to opportunities and insights

ANZ is New Zealand's largest and oldest bank, with an extensive network across all sectors of the New Zealand economy. Whatever your investment focus and interests may be, we can connect you to a wide range of businesses and investment opportunities in New Zealand. Our sector expertise includes:



We can also connect you with the whole range of ANZ's resources and specialist expertise, including economics, investment management, foreign exchange, markets and more.



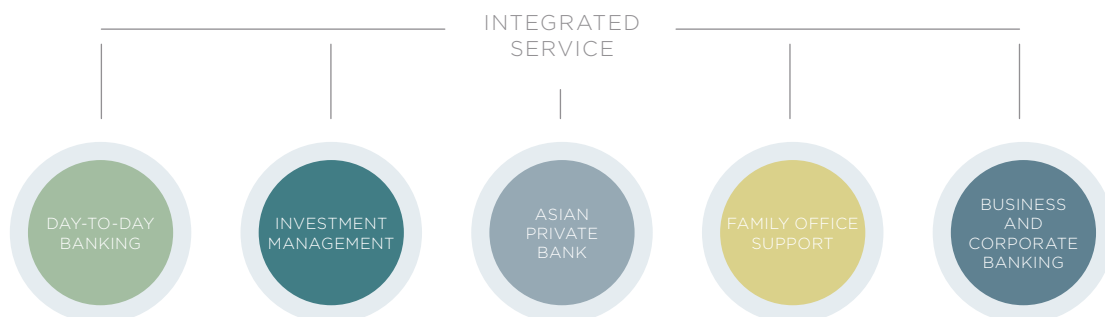
### Due diligence

Assessing investment opportunities in a new country can be challenging. As New Zealand's largest bank we can leverage our extensive resources of data and expertise to help you undertake due diligence and invest with confidence.



### A complete, end to end financial service

ANZ Private is the only private bank in New Zealand to offer a complete, integrated service. We are also the only New Zealand private bank with our own Investment Management team. From looking after you and your family's day-to-day banking, helping you manage your investments, supporting your family office, business and corporate banking, insurance, and much more. ANZ Private can assist with all your financial and investment needs all in one place.



# WHY CHOOSE ANZ PRIVATE?



A HIGHLY  
PERSONALISED  
APPROACH

As an ANZ Private client you'll have your own Private Banker, who will work closely with you to understand your situation, needs and interests. They will be your single point of contact for both investment and day to day financial needs. Your Private Banker can also connect you to all the specialist resources and expertise of the global ANZ network – giving you the ease and convenience of a 'one-stop-shop'.



UNMATCHED  
FINANCIAL  
STRENGTH

ANZ Investments is New Zealand's largest private sector funds management and KiwiSaver scheme provider<sup>1</sup>. We manage more than \$30 billion in investments for over 650,000 investors throughout New Zealand. We are also New Zealand's oldest bank, with a track record of helping our clients succeed that reaches back over 180 years – giving you the reassurance of a strong financial partner at your side.



RECOGNISED  
AS THE BEST

We are proud to have been awarded Best Private Bank in New Zealand at the Global Private Banking Awards since 2018.



NATIONWIDE  
PRESENCE

Wherever you plan to live, invest or do business in New Zealand, ANZ is nearby. We have branches and offices around the country and can provide a local perspective on each region.



## For more information

To find out more about how ANZ Private can help you achieve your ambition, please contact us on

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(0800 500 588 within New Zealand),

privatebankingenquiry@anz.com

anz.co.nz/private-bank



1. Morningstar Retail Market Share Report, December Quarter 2022

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