



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 bonds and 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, property developers 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.



KEY INFORMATION

The Active Investor Plus visa is designed to increase the flow of foreign capital and encourage skilled, experienced investors to invest in New Zealand’s investment ecosystem and make a significant contribution to New Zealand’s economy.

KEY FEATURES OF THE INVESTMENT CATEGORIES

There are two investment categories that investors must choose between, being the Growth Category and the Balanced Category. Key features of both categories are outlined in the table below:

Key Features	Growth Category	Balanced Category
Minimum investment amount	NZD \$5 million	NZD \$10 million
Investment Period	3 years	5 years
Acceptable investments	<ul style="list-style-type: none"> • Managed funds* and/or • Direct investments* <p><small>*as approved by NZTE</small></p>	<ul style="list-style-type: none"> • Listed equities • Philanthropy • Property development* • Bonds <p><small>*conditions apply</small></p>
Days required in New Zealand over the investment period	21 days	105 days* <small>*105 days may be reduced by investing extra funds (above \$10 million) into approved managed funds or direct investments (under Growth)</small> <small>\$1 million = 14-day reduction</small> <small>\$2 million = 28-day reduction</small> <small>\$3 million = 42-day reduction</small>
Investment retention checkpoints and completion of the investment questionnaire	24 months and 36 months	24 months and 60 months

WE HAVE TWO INVESTMENT SERVICES TO CHOOSE FROM

We offer a Discretionary Investment Management Service and a Trading Service, depending on your needs. Both services can help you meet Immigration New Zealand’s Investor and Investor Plus requirements.

DISCRETIONARY INVESTMENT MANAGEMENT SERVICE

We manage your portfolio for you, based on an agreed strategy.

Your Private Banker will work closely with you to identify the right investment strategy for you. Once this is agreed, your portfolio will be managed by our experienced investment management team.

Some of the key benefits of this service include:

- professional investment decision-making: your portfolio is managed by our investment management team
- actively managed portfolios: your portfolio is actively managed, with the aim of achieving better returns than a particular index or market
- diversified strategies: your portfolio will invest in a broad range of investments, to help reduce risk and maximise returns and strategies to meet Immigration New Zealand’s ‘growth’ investments criteria.

TRADING SERVICE

If you prefer to manage your own investments, our transaction-only trading service is a good option.

This service allows you to make your own investment decisions, and then we execute these decisions for you.

We don’t give advice, but we do give you:

- the ability to trade: tell us your investment choices and we’ll do the trading for you
- Immigration New Zealand information: information about the classes of investments that meet the requirements to qualify and settle in New Zealand
- access to current NZSX and NZDX market
- new opportunities: details of selected investment opportunities as they come to market.

HOW OUR INVESTMENT SERVICES COMPARE

	Discretionary Investment Management Service	Trading Service
Immigration New Zealand acceptable investments	•	•
Financial advice	•	
Actively managed portfolio	•	
Portfolio assets held in custody	•	•
Performance reporting	•	
Tax reporting	•	•
Valuation and transaction reporting	•	•
Immigration New Zealand reporting	•	•

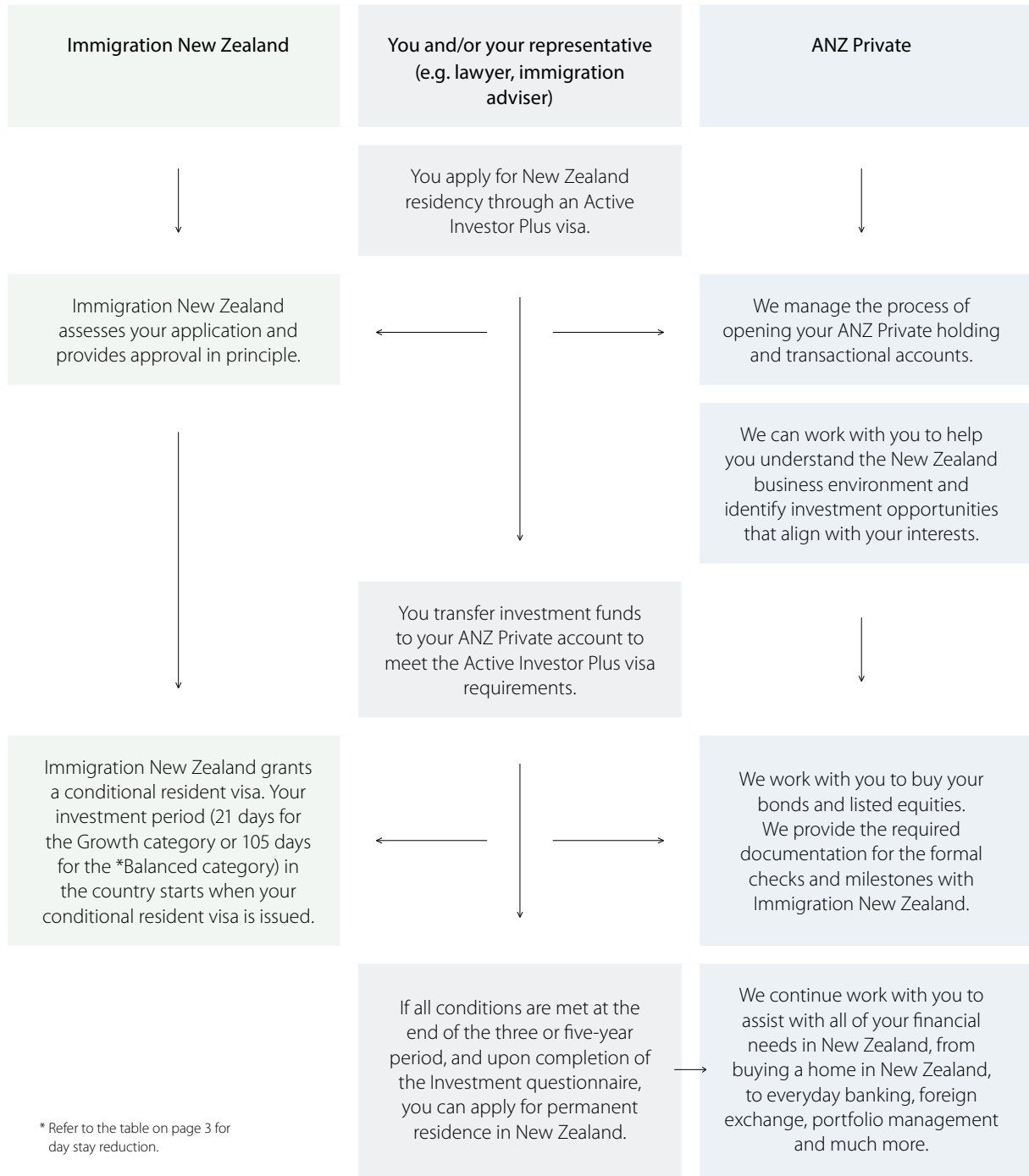
HOW ANZ PRIVATE CAN HELP



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

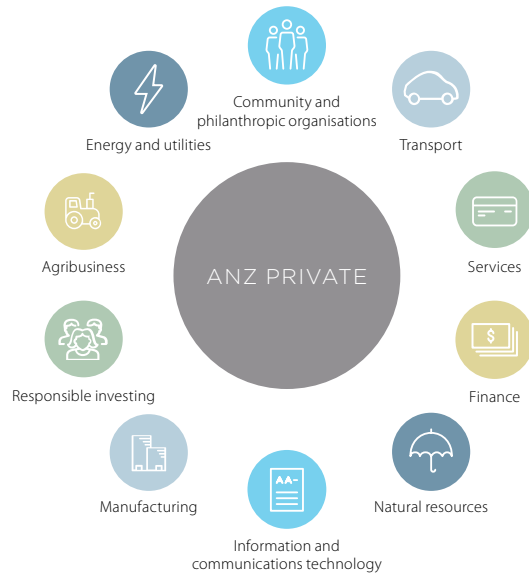
ANZ Private can help you open a New Zealand bank account while still overseas – making the process of applying for a Migrant Investor visa, and arranging your finances here much easier. Simply provide copies of the necessary documents (such as your passport and proof of identity) and we'll manage the 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.



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 are illustrated in the graphic here.

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.



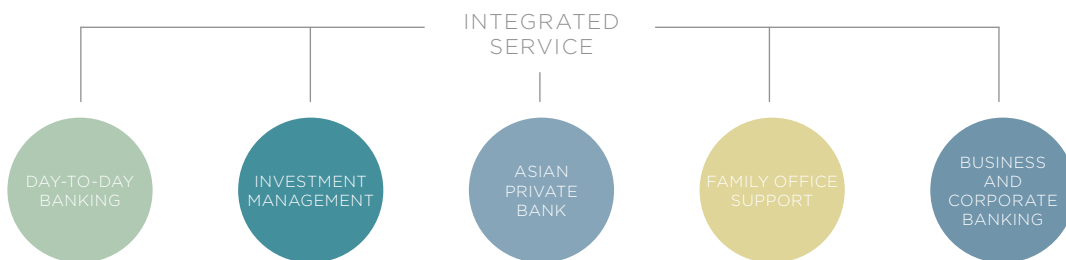
Due diligence

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 ANZ portfolio 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 provider¹. 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.




1. Morningstar Retail Market Share Report, December Quarter 2022

This material is for information purposes only. Please talk to us if you need financial advice about any ANZ Private product or service. See our financial advice provider disclosure at anz.co.nz/fapdisclosure

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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 anz.co.nz/private