




Helping you navigate
New Zealand's Active
Investor Plus Visa



The New Zealand Active Investor Plus Visa is designed to promote investment-based migration for individuals and their families.

At Jarden Wealth, we work with you to create tailored investment solutions to meet your investor visa requirements.

To talk further about how Jarden Wealth can assist you, reach out to an adviser.

New Zealand's Active Investor Plus Visa aims to attract foreign capital and skilled investors to areas that support the Government's economic goals.

Why choose New Zealand?

New Zealand boasts:

- ▶ a robust and resilient economy, provides a solid foundation for long-term growth and prosperity
- ▶ a high standard of living, world-class education, and healthcare systems in one of the world's most beautiful countries
- ▶ a clean environment, low crime rates, and friendly communities
- ▶ a thriving innovation ecosystem, providing a fertile ground for cutting-edge ventures and investments.

The Active Investor Plus Visa

- ▶ **Residency pathway:** The Active Investor Plus Visa offers a pathway to New Zealand residency for you and your family, allowing you to enjoy the benefits of living in New Zealand.
- ▶ **Investment opportunities:** Access a range of investment options, depending on the visa category applied for.
- ▶ **Supportive environment:** Benefit from a supportive regulatory environment and a transparent legal system. New Zealand's business-friendly policies and transparent legal framework make it an attractive destination for investors.

Investment requirements

From 1 April 2025 the Active Investor Plus Visa has two categories:

	Growth Category	Balanced Category
Minimum investment	NZD\$5 million	NZD\$10 million
Investment period	3 years	5 years
Acceptable investments ¹	<ul style="list-style-type: none">• Managed Funds• Direct Investments	<ul style="list-style-type: none">• Listed Equities• Bonds• Property Development• Philanthropy• Managed Funds• Direct Investments
Minimum time in New Zealand ²	21 days	105 days ³

All investments must be in New Zealand, in New Zealand dollars and made within 6 months of your approval in principle (with an option to apply for a 6-month extension). Investments cannot be for your personal use.

¹ As determined by NZTE (for Managed Funds and Direct Investments) or Immigration New Zealand (for all other asset types)

² During investment period

³ Time required to be spent in NZ may be reduced if additional funds are invested into Managed Funds and / or Direct Investments



Why Jarden Wealth Management?

Jarden Wealth develops relationships with a range of clients from individuals and families to iwi, private companies and more.

We safeguard New Zealand's wealth and provide expert investment advice through a suite of carefully honed services that look after our clients.

- ▶ **Personalised service:** By getting to know you and understanding your long-term financial goals, we can tailor our services to suit your circumstances.
- ▶ **Dedicated adviser team:** We take a team approach when delivering our services, ensuring you receive continuous, co-ordinated support.
- ▶ **Discretionary service:** Our Discretionary Investment Management Service enables you to delegate day-to-day portfolio management to your adviser team, who make investment decisions to accommodate your financial needs while remaining compliant with your visa's investment requirements.
- ▶ **Research backed decisions:** Jarden's financial advice is backed by our leading investor team, drawing on our market research to help you get the most out of your investment portfolio.
- ▶ **Transparent reporting:** You will receive comprehensive quarterly reports, including portfolio valuation and performance, and annual tax reports. You can also view your portfolio online at any time via our digital platforms.
- ▶ **Lasting relationships:** You can expect a strong relationship built on trust, that continues beyond your migration to New Zealand.

How we do it

- 1 Understand your investment objectives, preferences and risk tolerance.
- 2 Define a tailored investment strategy and strategic asset allocation that best reflects your goals and risk appetite.
- 3 Construct and maintain a portfolio that is in line with this investment strategy and optimally positioned for prevailing market conditions.
- 4 Dynamic reporting and ongoing dialogue with you

Auckland

PwC Tower, Auckland
Level 32, PwC Tower, 15 Customs St West
PO Box 5333, Auckland

Jarden House, Auckland
Level 17, Jarden House, 21 Queen St
Auckland CBD 1010

Tauranga

Level 2, 41 The Strand
Tauranga 3141

Cambridge

Level 1, 86 Alpha St
Cambridge 3434

Gisborne

BDO Offices, 1 Peel St
Gisborne 4010

Havelock North

Level 1, The Village Exchange, 1 Havelock Rd
PO Box 28153
Havelock North

Masterton

186 Chapel St
Masterton 5810

Wellington

ANZ Centre, 171 Featherston St
PO Box 3394
Wellington

Nelson

Level 1, 6 Akersten St
PO Box 114, Nelson

Christchurch

Level 1, 148 Victoria St
PO Box 25258
Christchurch

Timaru

Level 1, 49 George St
Timaru 7910

Queenstown

Level 3, 36 Shotover St
Queenstown 9300

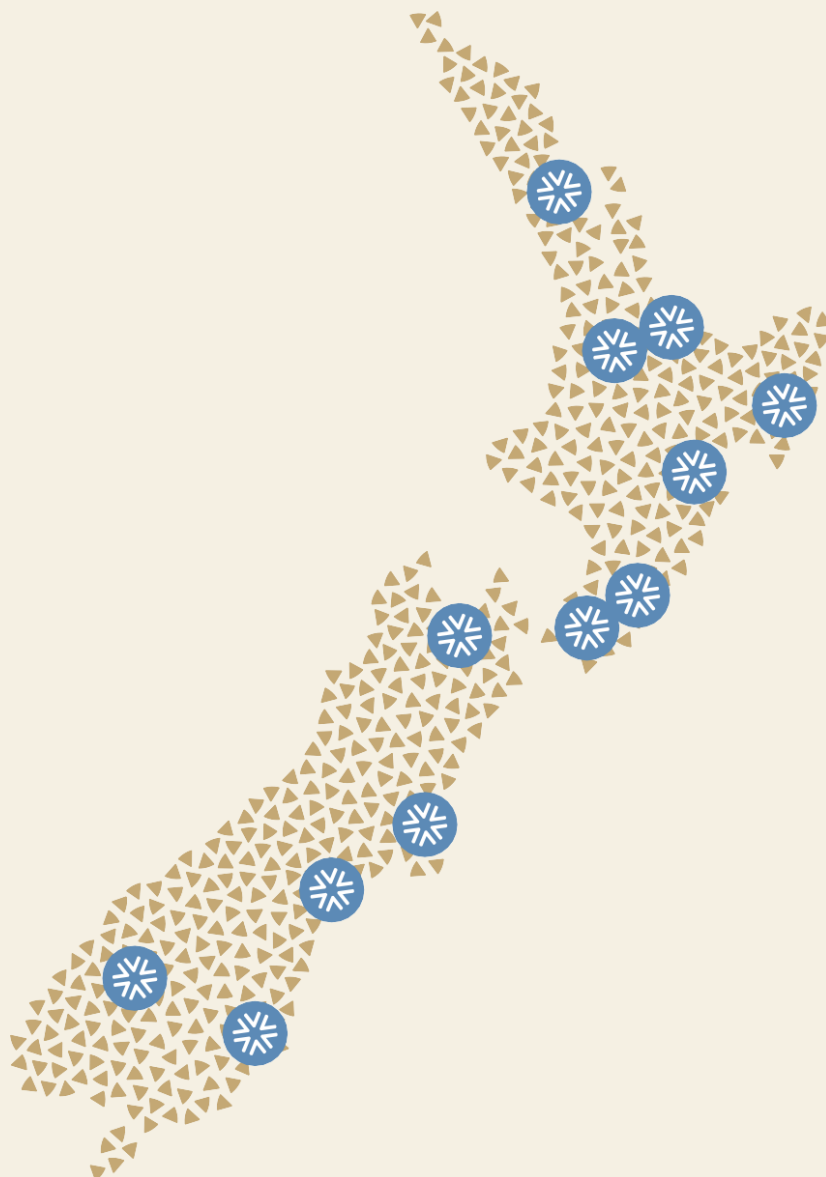
Dunedin

Level 2, 123 Vogel St
Dunedin 9016

Your trusted partner in securing a prosperous future in New Zealand

Contact us today to learn how we can help you achieve your financial and residency goals through New Zealand's Active Investor Plus Visa.

www.jarden.co.nz/wealth-management





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