

Case Study

Enduring Powers of Attorney | Tax
and Accounting Management



Beryl came to Perpetual Guardian shortly after she lost her husband of 50 years. Jim had always handled the family's finances and after he died, Beryl wanted someone who would be there to help her through the rest of her life.

Beryl worked with her local Perpetual Guardian expert to develop a conservative investment strategy to ensure her wealth would last for the rest of her life and leave something for her six grandchildren:

- A tailored investment strategy with a focus on dividend yielding stocks was established; and,
- Arrangements were made to manage her time-consuming investment properties.

While Beryl still felt capable of making decisions, there was a history of dementia in the family and she wanted to ensure her wealth would be taken care of in the event of her becoming unwell. Setting up an Enduring Power of Attorney (EPA) would ensure that Perpetual Guardian could step in on her behalf if needed.

Today she can enjoy her grandchildren and feel secure about her investments and in knowing that her loved ones will be taken care of.

We offer real depth of expertise

We believe a great team is Perpetual Guardian's most valuable asset. Our people are passionate about what they do, how they do it and care about the well-being of those who have entrusted them with the safe guarding of their assets. Perpetual Guardian employs highly trained and qualified staff. They are experts in providing well-crafted Trusts, Wills and Enduring Powers of Attorneys to ensure that your assets are protected in the way that you want.

Our team can be found throughout our wide network of offices across New Zealand and are available to work directly with you. It also means our experts will be there locally when you need them. The advisers are supported nationally by the strength and depth of a trustee company which has been serving New Zealanders for over 130 years.

***Be smart ~
speak to us today.***

Visit our website
www.perpetualguardian.co.nz

Call us on
0800 737 738