



Meet the experts

This month, we shine the spotlight on two of our colleagues, Paul Bartlett and John Bell.

Paul began his career in the insurance industry 47 years ago in administration, progressed into management, and transitioned to providing insurance advice in 1995. Paul notes, "Maintaining relationships with my original clients and our team has been incredibly fulfilling." Throughout these decades, Paul has accomplished personal goals and assisted numerous clients with their insurance needs.

Along the journey, Paul has also forged many valuable friendships.

John holds a Master's degree specialising in finance and is deeply committed to optimising KiwiSaver outcomes for individuals. Previously, he served as a commercial manager at Fonterra, overseeing the efficiency and productivity of three major factories. John established a financial advisory firm that serves over 1,500 KiwiSaver clients annually and looks forward to collaborating with Advice Financial.

Executive Insurance Advisor

Paul Bartlett



Q What's your role within the company, and what are your primary responsibilities?

A These days, my focus within the company revolves more around administrative tasks and mentoring, often referred to as the "the proteges." With over four decades of experience in the insurance industry, my main responsibility is to offer guidance on how insurance can best cater to the needs of individuals and businesses while maintaining affordability. Leveraging my extensive industry knowledge, I ensure that insurance solutions are not only effective but also cost-effective, efficiently meeting the requirements of our clients.

Q What aspects of insurance are you most passionate about?

A I am deeply committed to ensuring that insurance claims are processed and paid promptly. My priority is to ensure that the policy functions effectively when individuals and businesses require it the most, thereby fulfilling its fundamental purpose of providing financial security and support during challenging times.



KiwiSaver Specialist

John Bell

Q What key services or support do you provide to our clients?

A I offer personalised KiwiSaver services including education, investment strategy selection, contribution maximisation guidance, and regular portfolio reviews. My goal is to empower clients to achieve their financial objectives through tailored advice. Importantly, I operate independently of any KiwiSaver providers, allowing me to tailor my advice specifically to each client's needs and preferences.

Q How do you support clients in understanding and optimizing their KiwiSaver investments?

A I offer meetings in person, online, or over the phone. When we collaborate, I conduct regular reviews and make adjustments as needed. This service is provided at no cost to you, as I am remunerated by the KiwiSaver providers.

Contact

For a quick 5-minute KiwiSaver health check, contact John today.

[Contact an Adviser](#)



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