



Corporate Profile

www.fidelitylife.co.nz

Helping Kiwis look after what's important and plan for the future.

What's important to you is important to us.

Fidelity Life Assurance Company Limited provides life insurance, savings and investment products developed by New Zealanders for New Zealanders, giving you financial choices when you need them most.

Fidelity Life is a 100% New Zealand-owned and managed **specialist life insurance, savings, investment and KiwiSaver Scheme** provider. We were founded in 1973 by Gordon Watson a true-blue Kiwi, and we stay dedicated to our roots.

We're a friendly, progressive and trustworthy company supported by a nationwide network of dedicated people offering financial advice.

We strive for excellence and integrity; and regard all our stakeholders, such as; policyholders, shareholders, financial advisers, staff, and suppliers as part of our extended business family. Nearly three quarters of the staff who were working for us five years ago are still with us today.

What we do

- ▶ **Life and business insurance**
- ▶ **Disability insurance:** income protection, critical illness (trauma), total and permanent disability
- ▶ **Regular savings and lump sum investments:** We have a range of investment options available
- ▶ **Retirement planning:** KiwiSaver, personal superannuation, annuities and corporate superannuation.

Values

Keeping the faith

The name 'Fidelity' embodies our promise to care and 'keep faith'. This promise is kept when someone dies, is diagnosed with a critical illness or becomes disabled. We help by being there when you need us, we also help you take care of your financial future with long-term savings plans and investments.

Treasuring what you value

Carefully managing and treasuring things on behalf of others is central to the success of Fidelity Life. The financial resources entrusted to us are prudently managed.

Stewardship

Fidelity Life recognises our obligations to be environmentally and socially responsible, being a major sponsor of the Leukemia and Blood Foundation, and supporting other charities.

Key facts as at 30 June 2009

\$439 million funds under management

Annual profit of \$10.4 million (year end 30/6/09)

Total annual in-force annual premium \$74.7 million

A total of \$40 million in claims were paid (year end 30/6/09)

- ▶ \$24.9 million death claims
- ▶ \$7.3 million income protection claims
- ▶ \$7.8 million critical illness claims

Over 35,000 Fidelity KiwiSaver Scheme members

A- (excellent) credit rating from A.M. Best unchanged since December 1996.¹

Visit www.fidelitylife.co.nz for details about our insurance and investment solutions, free copies of the Fidelity KiwiSaver Scheme and Fidelity Life Investment Statements, latest news and investment returns.

Talk to your financial adviser about what's best for you. If you don't have an adviser, please contact us, and we'll put you in touch with one.

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Fidelity Life Assurance Company Limited

Auckland – Head Office

Fidelity House, 81 Carlton Gore Road, Newmarket
PO Box 37-275, Parnell, Auckland 1151

Telephone: 09 373 4914 or 0800 882 288

Facsimile: 09 308 9953

Website: www.fidelitylife.co.nz



Did you know? This product is printed on paper with fibre sourced from sustainable resources – Fidelity Life preserving our environment.

FIDELITY LIFE ASSURANCE
COMPANY LIMITED HAS AN

A- (EXCELLENT)
RATING

GIVEN BY A.M. BEST, A SPECIALIST INSURANCE RATING AGENCY