



Lisa McLeod

Registered Financial Advisor and Chartered Insurance Broker

NZCFS Level 5 Qualified

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“Working with YOU to protect YOUR business.”

Trust and professionalism are the key to building and maintaining strong client relations. I take insurance personally and see myself as part of your business's advisory team. I will take the time to work with you on a personal level, to understand what is important to you, to help you to identify your specific risk exposures and then tailor an insurance programme unique to your individual business requirements.

My experience spanning 30 years in the industry, both as underwriter and a broker has been fulfilling and rewarding. The one constant being change, and having to be ready to adapt. Having strong insurer relationships together with my underwriting experience and working with a diverse range of SME and corporate businesses has provided me with an in-depth knowledge of the daily challenges faced by business owners and the ability to negotiate comprehensive coverage, competitive terms and favorable claim outcomes.

The right covers are vital in helping to ensure the future financial security of your business following an insured event. Not all insurance policies are created equally and in a constantly changing market every business, now more than ever needs professional insurance advice, particularly in respect of legislative changes and emerging risks such as Cyber Liability.

People before paperwork is a motto we follow and this means providing clients with an advice-based service where their needs are the priority. Sound risk management, of which insurance is only part, is one of the cornerstones of a successful business. It is often given less importance than it deserves and treated as just another expense. My role as a Chartered Insurance Broker is to help guide you through the transfer of risk and reduce the stress of arranging appropriate insurance cover.

Claim time is when you see the real value of your insurance programme. Managing the claims process is a fundamental part of my service to you and an area I excel in.

I am able to offer a variety of insurance solutions for your business including Business Continuity Planning, which helps

you design your response to a wide range of risk exposures – not just disaster recovery.

Continual improvement is paramount when you've been in the insurance industry as long as I have. At Meridian General we wholeheartedly believe that we owe it to our clients to keep ahead of industry change and new regulations. A big part of this was voluntarily undertaking the latest insurance training to ensure our professional development *exceeded* the highest level of insurance regulations.

Proudly New Zealand owned and operated, means we are easily able to adapt to our client's immediate needs. Our profits stay in NZ, rather than being passed on to overseas parent companies, and we love that.

Added customer protection is provided by our Insurance Advisernet (IANZ) network.

Specialisations

- Fire & General Insurance Products
- Liability Programmes
- Scheme Management - Groups & Associations
- Claims Management
- Risk Analysis and Solutions
- Business Continuity Planning
- Relationship Management
- Conflict Resolution

Qualifications And Memberships

- Registered Financial Adviser (FSP72161)
- NZQA National Certificate of Financial Services – Financial Advice (NZCFS Level 5)
- ANZIFF Certificate 5 In Financial Services
- NZIM Diploma in Management
- National Certificate in Business Studies
- Chartered Insurance Broker (CIB)
- Insurance Brokers Association of NZ (IBANZ)
- Professional IQ College of NZ
- Insurance Advisernet NZ (IANZ)

Let's
talk

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