



## March 2021

Tylee+Co in conjunction with Shoreline Partners is assisting Implemented Investment Solutions Limited raise capital.

This unique opportunity to participate in the fast growing New Zealand Wealth Management sector is summarised below.

Kind regards  
Dougal Tylee

## Investment Opportunity - IIS Group



Implemented Investment Solutions Limited (IIS Group) is comprised of three established investment companies:

- InvestNow Saving and Investment Service Limited (InvestNow);
- Fund Hosting NZ Limited (Fund Hosting); and
- Hunter Investment Management Limited (Hunter).

IIS Group owns 100% of InvestNow and Fund Hosting and 50% of Hunter.

## InvestNow



InvestNow is an online investment platform business and has now grown to having NZ\$750 million of assets being managed for more than 17,000 investors. InvestNow recently launched an innovative InvestNow KiwiSaver Scheme, which currently provides investors with access to more than 28 different investment funds from nine leading investment managers – including Milford, Harbour, Mint, and AMP Capital. For a great insight into this successful and growing investment platform view [www.InvestNow.co.nz](http://www.InvestNow.co.nz).

## Fund Hosting

The Fund Hosting business builds and manages New Zealand domiciled investment funds predominantly for global investment managers who want to offer their investment expertise and solutions within New Zealand funds, but are not licenced themselves. Today, Fund Hosting manages 19 PIE funds with over NZ\$5.0 billion of assets on behalf of nine investment managers (clients) including leading global investment managers like First Sentier, Franklin Templeton, and Russell Investments.

## Hunter



Hunter is an investment management business and today has over NZ\$1.0 billion of funds under management and offers three PIE-compliant New Zealand domiciled funds. The largest of these (the Hunter Investments Global Fixed Interest Fund) is managed by leading global investment expert PIMCO.

## IIS Group

IIS Group's funds under management (FUM) have grown from NZ\$1.0 billion in 2016/17 to over NZ\$6.0 billion today, or 522%. This exponential growth has added significant scale to the IIS Group, while also creating diversification both across and within each of the businesses. IIS Group's goal is to continue its strong growth and grow FUM to NZ\$30 billion over the next five years.

IIS Group has a strong executive team who have extensive experience across the investment and banking industries. Key executives include Anthony Edmonds (Managing Director) and Gareth Fleming (Chief Financial Officer). IIS Group also has strong governance with its board having a depth of experience covering the investment, banking, legal, and technology sectors. The board is comprised of Ian Russon (Independent Chairperson), Jeremy Valentine (Independent Director), Liz Maguire (Independent Director) and Anthony Edmonds (Managing Director).

## The Investment Opportunity

The strategic opportunities that are before IIS Group today means that it needs to invest additional expansion capital to accelerate growth. In this regard, IIS Group is seeking NZ\$4.0 million of equity capital, with the proceeds being applied to InvestNow technology and marketing, Hunter expansion capital and people capacity and capability.

IIS Group represents a unique opportunity to invest in a successful proven company, that also provides significant upside potential.

Expressions of interest are sought from investors interested in becoming a shareholder in IIS Group. The opportunity is available to wholesale investors, including eligible investors. Minimum investment parcels are NZ\$250,000.

Please contact me if you would like to learn more about this opportunity and/or to request further information.

Dougal Tylee

e: [dougal@tylee.co.nz](mailto:dougal@tylee.co.nz)

m: 027 326 3965

Tylee+Co is registered on the Financial Service Provider Register (FSP609449) to provide wholesale and/or generic financial adviser services to wholesale investors, including eligible investors (under the Financial Advisers Act 2008).

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**Our mailing address is:** [dougal@tylee.co.nz](mailto:dougal@tylee.co.nz)

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