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# “Why Now”? NZ “Endless Summer Sanctuary Investment” seminars.



Seminar Series Sponsors



Seminar Location, Ft Lauderdale, Florida. The world's yachting capital.

## SEMINAR SERIES TIMING “WHY NOW”

This paper discusses the timing of the “NZ Endless Summer” branded “Signature Series” seminars to be sponsored by Nash Kelly Global Ltd. A leading NZ Residency-By-Investment advisory firm.



Linda Brink -US Resident Director

NZ Showcase USA Inc

7/1/2025



# “Why now”

**Because of increasing global instability, the wealthy look to NZ.**

## MARKET TIMING

Whether it be a capital raising project or in the market, buying and selling shares, timing and purpose are key factors in attempting to determine the likelihood of delivering a successful outcome. As per the illustration below, a timing decision typically depends on two forms of analysis. i.e. both long and short to medium term analysis in the decision making process in today’s world where governments worldwide are drowning in debt.

### Market Timing

#### Basis of Strategy

##### Fundamental Analysis

It forms a mid to long-term view of its stocks and is based on its financial performance.



##### Technical Analysis

Technical analysis takes a short to a mid-term view and is based on historical stock performance and investor behavior.

## OUR SEMINARS - A LONG TERM VIEW INVESTMENT DIRECTING PLATFORM

In a world of rising debt levels and economic uncertainty, now is the perfect time to present New Zealand as a sanctuary for investors seeking stability, wealth preservation and an ideal environment to pass on their legacy. From political stability and favorable tax policies to a high quality of life and strong legal protections, New Zealand offers a comprehensive and appealing package for wealthy individuals, particularly those in the baby boomer generation looking to safeguard their wealth and secure a prosperous future for their heirs in an increasingly unstable world.

Now is indeed the time for New Zealand to present its credentials to this audience.



## “WHY NZ AS THE SANCTUARY OF CHOICE?”

*Here are some great reasons.*

### FIRST AND FOREMOST “the rising global demand for safe havens”

- **Millionaire Migration:** As the number of global millionaires increases, many are now seeking to preserve wealth and protect themselves from the financial risks associated with rising government debt and potential hyperinflation, New Zealand’s attractiveness as a safe haven grows. With increasing migration from wealthier countries to politically stable and economically sound jurisdictions, New Zealand is now well positioned as a prime destination for those seeking both financial and personal safety.
- **Wealth Preservation:** High-net-worth individuals are becoming more attuned to the risk of holding all their assets in one jurisdiction, especially in economies where national debt is rising. New Zealand’s appeal is growing as a jurisdiction that combines both wealth protection and growth potential, allowing investors to diversify risk and preserve their capital for future generations.

### SECONDLY New Zealand’s appeal to our target demographic, the **US Baby Boomer**

- **Wealth Transfer:** The US baby boomer generation is preparing to transfer trillions of dollars in wealth to the next generation. New Zealand’s high quality of life and stable environment provide an ideal setting for intergenerational wealth transfers. Wealthy individuals can safeguard their wealth while passing it on to their heirs with minimal taxation and administrative hurdles.
- **Retirement:** Many baby boomers are seeking safer, more peaceful places to retire. New Zealand’s climate, healthcare system, and attractive lifestyle options make it a highly desirable location for retirees. For those concerned with legacy preservation, New Zealand’s social and economic environment offers peace of mind.

### OTHER REASONS FOR CHOOSING NZ INCLUDE:

#### (1) **POLITICAL, ECONOMIC & TAXATION STABILITY,**

**Stable Governance:** New Zealand is known for its stable political environment has a reputation for being well-managed, transparent, and resistant to corruption. A very attractive attribute in a world facing increasing, global economic instability.



**Sound Fiscal Policies:** While the US and many other nations face ballooning national debts, New Zealand has maintained a relatively disciplined fiscal policy. The country’s debt-to-GDP ratio, though not immune to fluctuations, remains lower compared to many other developed nations, this reducing the risk of economic instability *or the imposition of punitive taxes on wealth.*

**Pragmatic Economic Management:** The New Zealand government tends to adopt prudent macro-economic policies, which help mitigate risks such as inflation and excessive taxation. These policies provide a level of economic security that is crucial for wealthy individuals seeking sanctuary for their assets.

**No Capital Gains Tax (CGT):** One of the most compelling reasons for sanctuary investing in New Zealand is the absence of a capital gains tax (CGT). This provides an attractive opportunity for high-net-worth individuals who want to protect their investments from high tax liabilities. In the U.S., increasing capital gains tax rates have become a growing concern for the wealthy, making countries like New Zealand an attractive option through which to allocate and structure investments.

**No Inheritance Tax:** New Zealand does not impose inheritance tax, unlike some other countries that place heavy burdens on the transfer of wealth. This is an important consideration for baby boomers looking to transfer their wealth to the next generation in a tax-efficient manner.

## (2) GEOPOLITICAL SAFETY

**Geographic Isolation:** New Zealand’s remote location in the South Pacific makes it a sanctuary from geopolitical instability. In a world where rising national debts and growing political tensions—such as trade wars, military conflicts, and civil unrest—are of increasing concern, New Zealand offers a level of geographical safety. This isolation also makes it less susceptible to the economic volatility that can impact larger, more globally integrated economies.

**Makes a Safe Haven for the Wealthy** Geopolitical stability makes New Zealand increasingly attractive as a destination for individuals seeking to protect their assets from potential economic or political crises in other parts of the world. A trend that will accelerate as global tensions rise and wealth inequality becomes more pronounced.

All of these reasons making New Zealand an increasingly sought after destination in an increasingly troubled world.





## OUR BRANDED SEMINAR SERIES SPONSORS “Nash Kelly Global Limited”

The presentation to American High Net Worth investors through investment seminars, must be professionally managed by professionals with career credibility in promoting New Zealand as an investment destination. We present below, our NZ based, Seminar Series Sponsor, who through its owners and directorate, is without doubt, one of the most qualified parties in New Zealand to present the country as a world class investment destination to HNW individuals and families.

### INTRODUCING STUART NASH. CEO NASH KELLY GLOBAL LTD NZ “Endless Summer Sanctuary Investment” Series Sponsor



Stuart Nash, CEO Nash Kelly Global Ltd. Seminar Series lead Speaker.  
“Architect” of the “Active Investor Plus” NZ visa program.  
Background “Lauderdale Yacht Club” Seminar Series US base.

### SEMINAR SERIES -ACTIVE INVESTOR TARGET

#### Founding of NZ’s “Active Investor Plus” (AIP) program

Knowing that Stuart Nash played a pivotal role in the establishment of the **Active Investor Plus visa program** as part of a strategy to attract high-net-worth individuals who could bring investments and expertise to the country, we reached out to him to partner with us in developing our “Endless Summer” branded seminar series for the following reasons.

- His AIP efforts were aligned with the objective of using foreign investment to support New Zealand’s long-term economic growth.
- Not short term capital parked in NZ for residency privileges only.
- The AIP visa was intended as a high-profile initiative designed to balance attracting capital with ensuring that investors made meaningful, (active) contributions to New Zealand's economic and social fabric.



## NEW ZEALAND’S ACTIVE INVESTOR PLUS (AIP) PROGRAM

As a cabinet minister under Prime Minister Jacinda Ardern in the previous NZ Labour government, Stuart Nash played a significant role in the launch and development of New Zealand's **Active Investor Plus (AIP) visa** program. Designed to attract high-net-worth individuals (HNWIs) who were willing to invest a significant amount of capital into the New Zealand economy in exchange for residency privileges.

### Background to the Active Investor Plus (AIP) Visa Program

The **Active Investor Plus** visa was introduced in **2021** as part of a wider strategy to boost New Zealand's economy by attracting global investors with substantial financial resources who would not only contribute capital but also actively engage with the New Zealand economy, thereby creating jobs and driving innovation.

### Stuarts Role in the AIP Launch

As Minister, Stuart emphasized that this visa would be more selective, targeting investors who were committed to integrating into New Zealand's economic fabric and supporting broader societal benefits.

1. **Minister of Economic Development and Tourism:**

Stuart served as the **Minister for Economic Development** during Jacinda Ardern's government. This portfolio was central to overseeing initiatives that aimed to attract international investors and strengthen New Zealand's global economic ties.

2. **Policy Development and Advocacy:**

Stuart played a key role in the development of the AIP program with one of its main goals to attract **wealthy individuals** who could bring in **capital** and **expertise** to New Zealand through **long-term investment** that would stimulate economic growth by encouraging entrepreneurs, business owners, and investors to base themselves in NZ.

3. **Focus on Economic Contribution:**

One of the standout features of the **AIP visa** program was that it required investors to put in as little as **NZD5M** (the AIP visa minimum threshold) through direct investment into qualifying investments, actively participating in the economy through job creation and knowledge capital that would bring benefit to the NZ economy in the form of innovation, productivity, research and development.

4. **Investor Immigration Strategy:**

Stuart was also instrumental in the overall direction of New Zealand’s **investor immigration strategy**, aiming to shift the focus from simply attracting large sums of capital to attracting high-quality investors who could bring additional value to the



country. A **strategic move** to ensure that New Zealand didn’t just become a place where wealthy individuals parked their money but one where they actively contributed to the economy.

5. **Consultation with Stakeholders:**

Under his leadership, Stuart’s ministry worked closely with industry leaders, financial advisors, and immigration experts to fine-tune the details of the program. Emphasizing that any new immigration pathways for investors would have the backing of New Zealand businesses, communities, and the economy at large. There was a concerted effort to ensure that the program was well-calibrated to attract the **right type of investor**, while also ensuring that there would be oversight to prevent any unintended negative consequences.

6. **New Zealand's Economic Recovery Post-COVID:**

As New Zealand was working to recover economically from the pandemic, attracting foreign investment was viewed as one of the key strategies for recovery with Stuart recognizing that high-net-worth investors could play a pivotal role in this process, both through capital injection and expertise.

## THE REVISED AIP

With the election of a new Government in 2023, the original AIP program was the subject of minor modification and relaunched on April 1<sup>st</sup> 2025, recording a massive NZD1.15B in new investment inquiries in less than three months. Interestingly the core, NZD5M direct investment into Emerging Growth Companies remained in place, this receiving more than 70% of all applications.

## IN CLOSING

Under the newly structured “Invest New Zealand” SOE the AIP visa is now seen as an extension of New Zealand’s broader strategy to leverage **foreign investment** to stimulate economic recovery.

Proof absolute of the fundamental soundness of Stuart’s vision when setting up the original AIP program. To align “Residency-By-Investment” visa issuance with broader economic development objectives.

In supporting the “Endless Summer” residency program, Stuart is helping ensure that the visa attaches to a long term stay cycle that sees foreign investors playing an active role in supporting the growth of the NZ economy through the investment they made under their “NZ Endless Summer Sanctuary Investment”.

N Iverson.- NZ Resident Director  
NZ Showcase USA (NZ) Ltd.



# BRINGING US "SANCTUARY CAPITAL" TO NEW ZEALAND

## AMERICAN INVESTORS HAVE BEEN BEHIND MANY AGRIBIZ SUCCESS STORIES IN NZ

### NEW ZEALAND'S NEW YORK DOYEN

Was the late Julian Robertson, founder of Tiger Management whose early investments in NZ included his 1995 purchase of a working sheep farm in the Bay of Islands area of the country. An investment that appeared to motivate one of his "Tiger Cubs" to similarly invest in New Zealand's agribiz sector with the purchase a working sheep and cattle farm south of Gisborne. John Griffin, founder of Blue Ridge Capital in NY, bought Nick's Head Station in 2002.

Since then press reports over the years show that John has accomplished much in terms of his long-term plan to re-establish native flora and fauna on the property. A winner of awards for both his commitment to environmental restoration & architecture in the design of his personal sanctuary, he has also invested significantly into the Station, purchasing adjoining farms, becoming a significant employer in the area as his agribiz interests expanded.

## DEMONSTRATE A BENEFIT TO NEW ZEALAND'S ECONOMY

### FOREIGN OWNERSHIP OF NZ LAND

All land over 5ha requires Government approval. Farms and orchards are classified as "sensitive land" and require approval of the Overseas Investment Office where the land area exceeds 5ha. Typically, foreign investors acquire NZ assets through one of two avenues to secure approval. Both requiring an investor to demonstrate how their proposed investment will benefit NZ.

### IMMIGRATION INVESTMENT ROUTE

Comes with a residency requirement. As from 09/22 the Investor Residence Visa program requires an investment of NZD15M. Reduceable to only NZD5M provided it is put into a Govt approved private company needing early stage capital. However this comes with a lengthy residency commitment.

### BUSINESS INVESTMENT ROUTE

No residency requirement. However the investment will be subjected to close scrutiny with emphasis on what contribution an investment will contribute to the nation's economy. Our Agribiz Sanctuary investments are structured to enable a foreign investor to have the "best of both worlds".

## INTERGENERATIONAL BENEFIT

An NZ agribiz sanctuary investment ticks every box in the "benefits to economy" check list. It does this through its expansionary social impact delivery measured in terms of (1) sustainable recurring income for Grower-Producer tribal families, (2) wealth formation, (3) access to capital for rural agribiz growth, strongly espoused by the NZ Government.

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Jet belongs to Nick's Head owner

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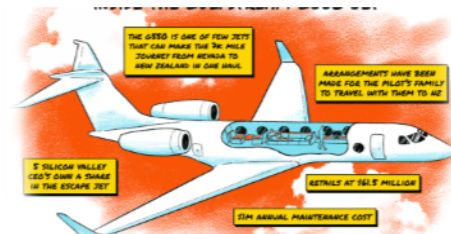
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US Financier John Griffins Bombardier Global 6000 at Gisborne Airport ,



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So let's close this deal ....