

## Fisher Funds acquires Aon New Zealand KiwiSaver Scheme and Master Trust businesses

Fisher Funds is pleased to announce that we have reached an agreement to acquire Aon New Zealand's superannuation business, which encompasses the Aon New Zealand KiwiSaver scheme and Master Trust.

Fisher Funds CEO Bruce McLachlan says the acquisition is a natural progression of Fisher Funds growth plans in funds management in New Zealand.

"This is an exciting moment for Fisher Funds and will further strengthen our position as one of New Zealand's leading active funds management businesses."

"As a result of this transaction over 21,000 KiwiSaver and Master Trust members and approximately \$1 billion will be added to our existing \$14.5 billion of funds under management (FUM). This will build on our strong organic growth and the growth in our clients' investment balances in recent times."

"The Aon New Zealand KiwiSaver Scheme and Master Trust businesses particularly appealed to us due to their clients' affinity to high quality active management investment solutions. This aligns with Fisher Funds ethos of delivering outstanding client outcomes."

"Our priority is now on working closely with Aon to ensure a seamless transition for all members and clients involved."

"Once the transition is complete all Aon members and clients will benefit from full access to Fisher Funds active investment team, online platforms, and award-winning client services team. There will be no impact on our existing Fisher Funds clients."

"I'm also pleased to confirm that all Aon New Zealand KiwiSaver Scheme and Master Trust employees will be offered roles at Fisher Funds, and we look forward to them becoming valued members of our team."

The transaction is due to complete at the end of November 2021 and will be followed by an extended transition period to allow the Aon businesses to be fully integrated into Fisher Funds.

Until the transaction completes, each business will continue to operate separately with no changes for members.

### ENDS

#### Media Contact

Thomas Pryor  
+64 21 818 973  
[thomas@shersonwillis.com](mailto:thomas@shersonwillis.com)

#### NOTE TO EDITORS:

#### About Fisher Funds

Founded in 1998 Fisher Funds is a specialist investment company managing more than \$14 billion for over 270,000 clients. We offer a full range of growth and income investment solutions including KiwiSaver. Our award winning disciplined active investment approach is unique and in 2021 we were the first investment manager to win both INFINZ Fund Manager of the Year award categories in the same year. We are proudly majority owned by the Toi Foundation meaning that the majority of our profits go towards supporting community and charitable efforts in New Zealand. Discover more at [www.fisherfunds.co.nz](http://www.fisherfunds.co.nz)

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