

A scenic landscape featuring a calm lake reflecting the surrounding environment. In the background, there are snow-capped mountains under a clear blue sky. The foreground is filled with lush green ferns and trees, some of which are reflected in the water. The overall atmosphere is peaceful and natural.

JBWere

New Zealand Migrant Investor Active Investor Plus Visa

Putting Wealth To Work for Generations

The New Zealand Active Investor Plus Visa is designed to promote investment-based migration for individuals and their families.

At JBWere, we work with you to create tailored investment solutions to meet your investor visa requirements.

To talk further about how JBWere can assist you, please email us on becomeaclient@jbwere.co.nz

Migrant Investor Pathway

A path to prosperity

The New Zealand Active Investor Plus Visa is designed to promote investment-based migration for individuals and their family. This visa category is for skilled and experienced investors who wish to participate in New Zealand's investment ecosystem and make a significant contribution to the New Zealand economy.

A gateway to permanent residency, the objective of this visa is to attract capital to grow New Zealand businesses, thereby achieving a broad impact through increasing employment and bringing migrant investor knowledge, skills, and networks to New Zealand.

The New Zealand economy is strong, and over the last 30 years has become one of the least regulated, free market-based economies in the OECD with an annual GDP of \$430bn¹. New Zealand has a diverse multicultural society, a highly skilled population, and a productive economy with world-class institutions.

Other reasons to choose NZ include:

- New Zealand is the easiest place in the world to do business, according to the World Bank's 2020 'Doing Business' report.
- New Zealand was ranked fifth in the Forbes 2019 Best Country for Business report.
- Placed third amongst OECD countries in the Tax Foundation's 2024 International Tax Competitiveness Index.²

For more information, visit Immigration New Zealand's website: www.immigration.govt.nz/live/.

Investment options

From 1 April 2025, the Active Investor Plus visa will have two pathways, each with different investment options:

Growth Category

- Investments in managed funds on Invest New Zealand's acceptable managed funds list
- Direct investment into NZ businesses that is deemed acceptable by Invest New Zealand.

Balanced Category

- Managed funds and direct investments as noted above, plus:
- Listed equities
- Bonds issued by the NZ Government, NZ local authorities or NZ firms
- Philanthropic donations to eligible registered NZ charities

- Property development, including:
 - new residential property developments
 - new or existing commercial or industrial property developments.

To be considered acceptable the investment must also be invested in New Zealand, in New Zealand currency, and not be for the personal use of the investor³.

For more information visit Immigration New Zealand's website: nzte.govt.nz/page/acceptable-investments.

Criteria for approval

You can nominate a mix of funds and/or assets to invest. They must be equivalent to at least NZ \$5 million for the Growth Category visa or NZ \$10 million for the Balanced Category visa.

You need to provide evidence showing that your investment funds and / or assets:

- are owned by you (or jointly by you and your partner and/or dependent children if they are included in the visa application)
- are unencumbered, i.e., not subject to any mortgage, lien, charge and/or encumbrance (whether equitable or otherwise) or any other creditor claims
- have been earned or acquired legally
- are transferable through the banking system or through a foreign exchange company that uses the banking system (note: Immigration New Zealand will not approve your application if you are unable to transfer funds to New Zealand through the banking system).

You will also need to provide evidence that you meet the following criteria:

	Growth Category	Balanced Category
Minimum investment funds	NZ\$5 million invested in NZ for three years	NZ\$10 million invested in NZ for five years
Minimum time in NZ	21 days during the three-year investment period	105 days during the five-year investment period
Time in country discount	No	Yes*
English language ability	No requirement	
Health and character	All applicants must meet requirements	

*Reducing the time in New Zealand requires at least NZ\$1 million additional investment (above the minimum investment amount) into acceptable Managed Funds or Direct Investments.

¹ Year ending March 2025. Source: stats.govt.nz

² Source: taxfoundation.org

³ Source: immigration.govt.nz

Application process

Following the submission of your application:

1. Immigration NZ approves your application in principle.
2. You have 6 months⁴ to transfer your nominated funds to New Zealand and fully invest into acceptable investments for the category you are approved for. JBWere can work with you to invest in compliance with visa requirements.
3. Immigration NZ grants your residence visa.

For detailed information, visit Immigration New Zealand at immigration.govt.nz/new-zealand-visas.

How can JBWere help?

As a JBWere client you will benefit from the considerable knowledge and experience of your own professional advisory team, who has access to world-class partners, including Citi, UBS, Jarden and National Australia Bank.

We believe in long-term relationships, strengthening the financial standing of our clients through solutions tailored to your exact needs, and ensuring you achieve your objectives.

JBWere offers investment portfolios specifically designed for migrant investors, which are:

- compliant with the acceptable investment criteria
- designed to fit a range of risk tolerances
- supported by ongoing monitoring and reporting. We'll keep monitoring the investments in your JBWere portfolio to make sure they're still suitable and will provide you with detailed reporting about your portfolio so you can see what's in it and how it's performing.

We will provide you with the highest level of service before, during and after you migrate to New Zealand, and we have close connections with leading immigration advisers and banks who can offer complimentary support.

About JBWere

For generations JBWere NZ has been helping investors navigate local and offshore financial markets across multiple asset classes. Today, as part of the FirstCape group of companies, JBWere continues to be a leading specialist provider of investment services.

We focus on providing tailored advice to wealthy individuals, entrepreneurs, partners and business executives, family offices, through to for-purpose organisations and institutions.

To learn more, please visit www.jbwere.co.nz or email us at becomeaclient@jbwere.co.nz.

⁴ You may apply to have this timeframe extended by up to 6 months (12 months in total) under certain circumstances.



www.jbwere.co.nz

Important notice

Our normal account opening criteria apply.

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