



Toolkit 1: Social and eDM Adviser Assets



MUTUAL
FOR PROFESSIONALS

PPS Mutual Social and eDM Toolkit 1:

Helping you connect with the right clients, in the right way.

As an accredited PPS Mutual adviser, you have access to something genuinely different – an offer designed specifically for professionals, with a model that works strongly for them.

This toolkit has been created to help you introduce PPS Mutual to your clients and prospects in a clear, confident and approachable way.

It brings together a set of ready-to-use communications to help you explain what makes PPS different, and start meaningful conversations with the people who are most likely to benefit.

Everything has been designed to be easy to use and easy to adapt – so you can tailor it to your voice, your clients and your business.

We have provided five content modules:

Content for two emails (EDMs):

1. An intro to PPS – for existing clients you've identified as eligible
2. An intro to PPS – for prospective clients, with space to introduce yourself and your advice approach

Content for three social posts:

3. Announcing your PPS accreditation and introducing PPS
4. Highlighting who may be eligible
5. Explaining the mutual model and the PPS Profit Share Benefit (PSB)

For each content module, we've supplied:

1. Recommended copy that you can tailor to your own personal style of emails and social posts
2. A relevant image (in PPS Mutual branded style, with two size options) that you can use in these emails/posts

How we've structured this toolkit:

- This 'START HERE' guide shows you all the available content – copy and images.
- All images are provided in the 'IMAGES' folder. The image names are shown in the following pages of this doc.
- There is also a 'COPY' doc provided to make it easy for you to cut and paste the post text.

If you have any questions or suggestions – please don't hesitate to get in touch with your key PPS Mutual contact.

eDM 1: Intro to PPS for eligible clients

Recommended copy

Hi [name],

As a financial adviser, I work with a wide range of insurers, but I'm especially excited to introduce you to PPS Mutual, now launched in New Zealand and available exclusively through a very select group of accredited advisers like me.

What makes PPS Mutual different?

Simple: it's designed specifically for professionals, like you.

PPS Mutual focuses solely on a defined group of New Zealanders, people in roles that require specialist knowledge, qualifications, and experience. Think doctors, lawyers, engineers, architects, accountants, and other skilled professionals. And that focus shapes everything:

- Tailored life insurance products designed with your needs in mind
- A strict eligibility model that maintains member value
- Exclusive access for eligible professionals, their spouses, children, and key business associates

But there's more. PPS Mutual is a mutual – which means it's owned by a trust for the benefit of its members. Not external shareholders. Just a long-term commitment to delivering value to the people it protects. That includes a unique Profit Share Benefit, giving members the chance to share in the company's financial success over time.

Based on your education and profession, you may be among a relatively small group of New Zealanders who is eligible to become a member. Given the exclusivity of PPS Mutual's offering, and how rare it is to see a new entrant in the Life Insurance market, I felt it was important to ensure you were at least aware of PPS as an option, even if no immediate changes are required.

If you'd like, I'd be happy to explain how PPS Mutual works and whether it could be relevant instead of, or alongside, your existing arrangements.

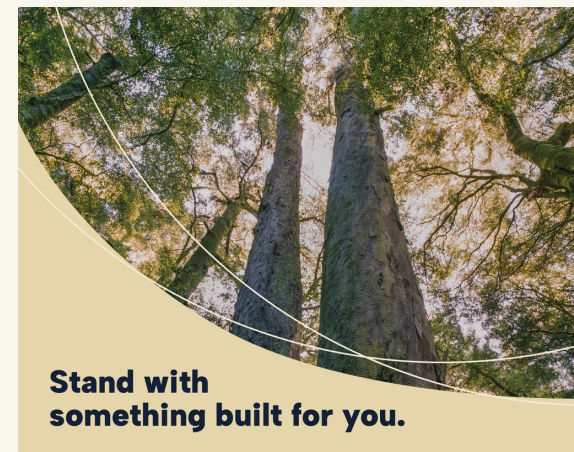
Please let me know if you'd like to organise a time to discuss.

[ADVISER NAME] [CONTACT DETAILS]

Recommended image



600px x 200px File name: eDM_01_Intro_Eligible_600x200



1080px x 1080px
File name: eDM_01_Intro_Eligible_1080x1080

eDM 2: Intro to PPS for prospective clients

Recommended copy

Hi [name],

[ADVISER INTRODUCTION – please add a brief intro about yourself, your practice, and how you help clients here.]

I'm reaching out today because I want to make sure you're aware of something that could be genuinely relevant to you: PPS Mutual, a life insurance provider now available in New Zealand.

PPS Mutual isn't for everyone – and that's exactly the point.

Founded over 80 years ago by professionals for professionals, PPS has grown into a trusted global network, now serving over 160,000 members across South Africa, Australia, and New Zealand. It's designed specifically for people in roles that require specialist knowledge, qualifications, and experience – doctors, lawyers, engineers, architects, accountants, and other skilled professionals. If that sounds like you, there's a good chance you may be eligible.

What makes PPS Mutual different?

- Built for professionals – products tailored to the needs of people like you, not a one-size-fits-all approach

- Exclusive membership – eligibility is deliberately limited, which protects and maintains the value of membership for everyone in it
- A mutual structure – PPS Mutual is owned by a trust for the benefit of its members, not external shareholders
- Profit Share Benefit – members have the opportunity to share in the company's financial success

Cover includes Life, Income Protection, Trauma, Total and Permanent Disablement, Terminal Illness and Key Person.

PPS Mutual is available exclusively through a select group of accredited advisers – and I'm proud to be one of them.

If you'd like to find out more – including whether you're eligible and how PPS might work alongside or instead of your existing cover – I'd love to have a conversation.

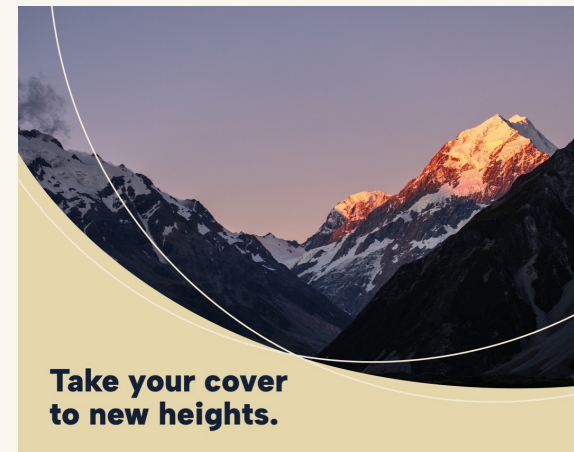
Please feel free to reply to this email or book a time that suits you.

[ADVISER NAME] [CONTACT DETAILS]

Recommended image



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File name: eDM_02_Intro_Prospective_1080x1080

Social post 1: Announcing accreditation/PPS intro

Recommended copy

I'm now an accredited adviser with PPS Mutual New Zealand – and I wanted to share what that means for my clients.

PPS Mutual has a story worth knowing. Founded over 80 years ago by professionals for professionals, it's grown into a trusted global network serving over 160,000 members across South Africa, Australia, and now New Zealand.

It's a life insurer built exclusively for professionals, available through a very select group of accredited advisers.

Who is it for? People in professional roles – doctors, lawyers, engineers, architects, accountants, and other qualified specialists.

Membership is deliberately exclusive, which is part of what makes it so valuable.

What really sets PPS Mutual apart:

- Products tailored to the needs of professionals
- A mutual structure – owned by a trust for the benefit of members, not shareholders

- A Profit Share Benefit – members can share in PPS Mutual's success when the business does well
- Available only through accredited advisers like me

If you're a professional – or know one who might be eligible – I'd love to have a conversation.

[CONTACT DETAILS / LINK TO BOOK A CALL]

Recommended image



600px x 200px File name: Social_01_Accredited_600x200



1080px x 1080px

File name: Social_01_Accredited_1080x1080

Social post 2: Professional eligibility/why PPS

Recommended copy

Are you a doctor, lawyer, engineer, architect, or accountant? You could be eligible for something most New Zealanders aren't.

PPS Mutual is a life insurer built exclusively for professionals – people whose careers require specialist knowledge, qualifications, and experience.

Most life insurance is designed for the broadest possible market. PPS Mutual takes the opposite approach.

By limiting membership to eligible professionals, PPS Mutual can tailor its products more precisely and maintain the value of membership over time.

Eligibility also extends to spouses, children, and key business associates – so the people closest to you can be protected too.

Here's why professionals are taking notice:

- Cover designed around professional life – not a generic policy you have to make fit
- Exclusive membership that protects the integrity of the risk pool

- Mutual ownership – decisions made with members in mind, not shareholders
- A Profit Share Benefit – members share in PPS Mutual's financial success when the business performs well

If you think you might be eligible, it's worth a conversation.

[CONTACT DETAILS / LINK TO BOOK A CALL]

Recommended image



600px x 200px File name: Social_02_Professional_600x200



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Social post 3: What is a Mutual/Profit Share

Recommended copy

Most life insurers in New Zealand are owned by shareholders.

PPS Mutual is built on a fundamentally different model – and for members, that difference is real and tangible.

PPS Mutual is a mutual, owned by a trust for the benefit of its members. There are no external shareholders to satisfy.

Instead, the focus is singular: delivering long-term value to the professionals it protects, through quality cover and local decision-making by people who understand the New Zealand market.

When you become a PPS Mutual member, you're not just buying insurance.

You're joining a purpose-driven community built on shared value and professional integrity – one with over 80 years of history and 160,000 members globally behind it.

And then there's the Profit Share Benefit – perhaps PPS Mutual's most distinctive feature.

PPS Mutual's unique Profit Share Benefit means members share in the long-term financial success of the business.

It's a genuine reward for being part of something built differently, and something you simply won't find at a conventional insurer.

Interested in learning more? I'd be happy to explain how it works.

[CONTACT DETAILS / LINK TO BOOK A CALL]

Recommended image



600px x 200px File name: Social_03_Mutual_600x200



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Ngā mihi



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