

Disclosure Document

Contact Details

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This disclosure statement was prepared on 15th May 2017.

It is important you read this document

This information will help you to choose a financial adviser that best suits your needs. It will also provide some useful information about the financial adviser that you choose.

What sort of adviser am I?

I am a registered, but not authorised, financial adviser.

I can give you advice about:

Your financial risk in respect of your personal and/or business/farm risks and in relation to:

- Life Insurance
- Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Medical Insurance
- Key Person Insurance
- Business Insurance
- Mortgage Protection Insurance
- ACC Insurance

What should you do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service, please tell me so that I can try to fix the problem.

You may contact the internal complaints scheme by advising me or a member of my team you wish to make a complaint.

If we cannot agree on how to fix the issue, or if you decide not to use the internal complaints scheme, you can contact the Financial Disputes Resolution scheme.

This service will cost you nothing, and will help us resolve any disagreements. You can contact The Financial Disputes Resolution scheme online at www.fdr.org.nz or via the following postal address:

Postal Address
Telephone Number
Fax Number
Email Address

Freepost 231075, PO Box 2272, Wellington 6140
Freephone 0508 337 337
04 918 4901
enquiries@fdrs.org.nz

How am I regulated by the Government?

You can check that I am a registered financial adviser at <http://www.fspr.govt.nz>

The Financial Markets Authority regulates financial advisers. Contact the Financial Markets Authority for more information including financial tips and warnings.

You can report information or complain about my conduct to the Financial Markets Authority, but in the event of a disagreement, you may choose to first use the dispute resolution procedures described above (under 'what should you do if something goes wrong?').

Declaration

I, Jonathan Lockyer, declare that, to the best of my knowledge and belief, the information contained in this disclosure statement is true and complete and complies with the disclosure requirements in the Financial Advisers Act 2008 and the Financial Advisers (Disclosure) Regulations 2010.



Jonathan Lockyer