

## Disclosure statement (Financial Adviser)

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### **It is important that 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 specialist mortgage adviser and can provide you advice as well as transactional services relating to mortgages.

### **I can give you advice about:**

- Residential Home Loans
- Business Loans
- Personal Loans

### **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. If we cannot agree on how to fix the issue, you may refer your complaint to Financial Services Complaints Ltd (FSCL) – A Financial Ombudsman Service. FSCL is our independent external ombudsman and dispute resolution service that has been approved by the Minister of Consumer Affairs under the Financial Service Providers (Registration and Dispute Resolution) Act 2008. FSCL's service is free of charge to you.

### **Financial Services Complaints Ltd (FSCL) - A Financial Ombudsman Service.**

Email: [info@fscl.org.nz](mailto:info@fscl.org.nz)

Phone: 0800 347257 or 04 472 3725

Postal Address: PO Box 5967, Wellington 6011

### **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 Securities Commission, 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, Claire Williamson, 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.

Signed: