

Disclosure Statement (Financial Adviser)



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It is Important that you read this document

This information will help you 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:

1. A contract of insurance (to cover financial consequences of untimely death, trauma, disability or illness), an investment linked contract of insurance (which is not a security), and a policy of life or endowment or annuity issued before 1 January 2009.
2. Loans for personal, domestic or household purposes (such as home loans). These are consumer credit contracts within the meaning of Credit Contracts and Consumer Finance Act 2003.
3. Bank term deposits, bonus bonds, call building society shares, call credit union shares, call debt securities, shares in a cooperative company, units in cash or term portfolio investment entities, Public Trust term deposits, bank deposit notice products and building society preference shares.

What should I do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service, please tell me or my internal complaints scheme so we can fix the problem. You may contact me directly or ClickCover Internal Complaints on 0800 ClickCover or team@clickcover.co.nz

If we cannot agree on how to fix the issue, or you decide not to use the internal complaints scheme, you can contact the Insurance & Financial Services Ombudsman. This service will cost you nothing and will help us resolve any disagreements. You can contact the Insurance & Financial Services Ombudsman at:

Physical Address: Level 8, Shamrock House, 78-81 Molesworth Street, Wellington 6011
Postal Address: PO Box 10-845, Wellington 6143
Freephone: 0800 888 202
Email Address: info@isfo.org.nz

How I am regulated by the Government?

You can check that I am a Registered Financial Adviser at: 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 I do if something goes wrong').

Declaration

I, Jamie Toon, declare that, to the best of my knowledge and belief, the information contained in this Primary 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:

A handwritten signature in black ink that reads "Jamie".

JAMIE TOON

Registered Financial Adviser