

## Disclosure statement for Beverley Davies

Name of financial adviser: Beverley Davies  
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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 Registered, but not authorised, financial adviser. I have my National Certificate in Financial Services – Level 5, which was attained in August 2011.

I can give you advice about:

Category 2 financial products such as life insurance, health insurance, trauma insurance, total permanent disability insurance, income protection insurance, mortgage protection insurance, risk insurance products, consumer credit contracts, home loans, mortgages, personal loans, and other insurance products.

### 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 can contact Insurance & Financial Services Ombudsman (IFSO) on 0800 888 202. This service will cost you nothing, and will help us resolve any disagreements.

You can contact Insurance & Financial Services Ombudsman at:

Address: P O Box 10845  
WELLINGTON 6143, Wellington

Telephone number: 0800 888 202  
Email address: [info@ifso.nz](mailto:info@ifso.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, Beverley Davies, 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: \_\_\_\_\_

Dated: \_\_\_\_\_