

Adviser Disclosure Statement

Name of financial adviser: Clair Marie Manley
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Financial Advice Provider Trevor Sutcliffe Insurance Limited

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It is important that you read this document

This information will help you make an informed decision whether I, as a financial adviser gives advice for products, that are suitable for your needs, and whether to accept that financial advice.

This disclosure statement is required under the -

Financial Markets Conduct (Regulated Financial Advice Disclosure) Amendment Regulations 2020

What sort of adviser am I?

I am a Financial Adviser that gives advice on behalf of Trevor Sutcliffe Insurance Limited, this Company is a Financial Advice Provider. Licences are issued by the Financial Markets Authority FMA.

The Financial Services Amendment Act 2019 requires Trevor Sutcliffe Insurance Limited (FSP721572) to hold a current licence for Advisers to provide Financial Advice to you the Client.

As a Licenced Financial Advice Provider Trevor Sutcliffe Insurance Limited have standard conditions on our licence. These conditions are not specific to us and do not limit or restrict the advice I may provide on behalf of Trevor Sutcliffe Insurance Limited.

What Financial Advice can we provide to you?

I can give financial advice on Fire and General Insurance Products for Commercial and Domestic Clients.

Fees, Expenses, or other amounts payable

Trevor Sutcliffe Insurance Limited will not charge a fee for the advice given to you but may charge a documentation fee for implementing that advice.

The amount of any fee will be disclosed to you when we provide our advice to you.

How do we get paid?

Trevor Sutcliffe Insurance Limited receive commission (brokerage) from the Insurance companies when you accept our advice and purchase an insurance policy.

The commission is paid to us by the Insurer based on each insurance policy that you purchase.

The commission only applies to the Insurer premium and excludes government charges and will range between 7% and 26%.

What should you do if something goes wrong?

If you have a problem, concern, or you are dissatisfied with either a product or any financial advice that has been provided by Trevor Sutcliffe Insurance Limited or me, and you require action to be taken, please tell us so that we can help and fix the issue.

You may contact the internal complaints scheme by emailing trevor@trevorsutcliffe.co.nz, by telephone on 07 8559311, or details of our Complaints Process are also available on our website www.trevorsutcliffe.co.nz

If you are unhappy with the outcome of our complaints process you can contact our independent dispute resolution scheme provider who will help you investigate and resolve your complaint, this service is provided free of charge, you can contact them at-

Financial Services Complaints Limited (FSCL)

Address: P O Box 5967 Wellington 6145
Telephone: 0800 347 257
Email: info@fscl.org.nz

You can report information about us to the Financial Markets Authority at <https://www.fma.govt.nz/contact>
Or email questions@fma.govt.nz but in the event of a disagreement, you may choose to first use the dispute resolution procedures described under **What should I do if something goes wrong?**