

Important Information

about your Financial Adviser



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What sort of adviser am I?

I am a Financial Adviser providing advice on behalf of Quantum Finance Auckland Ltd – FSP 1003910

Quantum Finance Auckland Ltd is an Authorised Body of Quantum Finance Ltd who is the Financial Advice Provider

Licence holder 751471

My qualifications

Level 5- NZ Certificate in Financial Services

- specialising in Life, Disability & Health Insurance, Investments (KiwiSaver), and Residential Property Lending

My duties

I am bound by the duties of the Financial Markets Conduct Act to meet the standards of competence, knowledge and skill as set out in the Code of Conduct for Financial Advice Providers. I give priority to my clients' interests and I exercise care, diligence and skill. I meet the standards of ethical behaviour, conduct and client care as set out in the Code of Conduct.

Accreditations



- ✓ Milford
- ✓ Booster
- ✓ Generate
- ✓ NZ Funds
- ✓ Kōura

I only provide financial advice on these KiwiSaver schemes. I won't be considering whether you're investing in other investment products such as managed investment schemes.

- ANZ
- BNZ
- SBS Bank
- Westpac
- ASAP Finance
- Avanti Finance
- Basecorp
- BIZCAP
- Cressida Capital
- DBR
- First Mortgage Trust
- Funding Partners
- Heartland Bank
- Liberty Financial
- Pallas Capital
- Plus Finance
- Prospa
- Southern Cross
- Unity

I may refer you to other service providers, including Generate Managed Funds. I will receive an ongoing payment of an amount equal to 0.125% of your account balance for referring you to Generate, in the event that you open an account. This fee is paid to me by Generate. The Generate adviser will provide general information or comprehensive advice on the Generate Managed Funds.

Professional memberships

I am a participating member of the Financial Services Complaints Ltd (FSCCL) Disputes Resolution Group.

Further Information

Full details on Fees & Expenses, Conflicts of Interest, and how we handle complaints, are on our website: www.quantumgroup.nz/our-obligations/

This information is available in writing. Please email the address below if you would like a copy.

HQ: B2/99 Greenwood Street, Frankton, Hamilton 3204

W: quantumgroup.nz

P: 0800BROKER

E: customerservice@quantumgroup.nz