

Important Information

about your Financial Adviser



Name: Lincoln Davie
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Phone: 022 444 4234

What sort of adviser am I?

I am a Financial Adviser providing advice on behalf of Quantum Finance NZ Ltd - FSP 748 272

Quantum Finance NZ 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

- Residential Property Lending and Investment

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

Banks, Lenders & Providers I'm accredited with:

- | | | | | |
|------------|-------------------|------------------------|---------------------|------------------|
| • ANZ | • Westpac | • CFML | • Heartland Bank | • Southern Cross |
| • ASB | • AIA (Sovereign) | • Co-operative Bank | • Pepper Money | • Zip Business |
| • BNZ | • ASAP Finance | • Cressida Capital | • Unity | |
| • SBS Bank | • Avanti Finance | • DBR | • RESIMAC | |
| • TSB | • Basecorp | • First Mortgage Trust | • Select Home Loans | |

Professional memberships

I am a current member of the NZFSG (New Zealand Financial Services Group) Mortgage Aggregation Group, and I am a participating member of the Financial Services Complaints Ltd (FSCL) 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