

Disclosure Statement (Financial Adviser)



About Me:

Name of adviser: Jeff Kerwin
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This disclosure statement was prepared on 18th December, 2017

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 can give you advice on:

- Mortgage and Lending planning
- Existing lending structure planning
- Class advice around the rules of Kiwisaver
- Debt management and Budgeting planning

What should you do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service we have an internal disputes resolution process that we need to complete. If we cannot agree on how to fix the issue you can contact Financial Services Complaints Limited. This service will cost you nothing, and will help us resolve any disagreements.

You can contact Financial Disputes Resolution Service at:

Freephone: 0508 337 337
Email: enquiries@fdrs.org.nz
Mail: Freepost 231075 PO Box 2272 Wellington 6140

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 also report on 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.

Declaration

I, Jeffrey Kerwin, declare 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 of the Financial Advisers Act 2008 and the Financial Advisers (Disclosure) Regulations 2010.

A handwritten signature in black ink, appearing to read 'Jeff Kerwin'.

Jeff Kerwin

