

## **DISCLOSURE STATEMENT for Ben Graham**

### **Financial Adviser at Mortgage Sure**

**Address:** 807 Railway Rd

Raureka

Hastings

**Phone:** 06 878 8444

**Mobile:** 027 2088 555

**Postal Address:** 807 Railway Rd

Raureka

Hastings

**Email:** [bgraham@mortgagesure.co.nz](mailto:bgraham@mortgagesure.co.nz)

**Website:** [www.mortgagesure.co.nz](http://www.mortgagesure.co.nz)

### **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 about all aspects of Mortgage arrangement and Personal, Business and Rural Risk protection, including Fire & General Insurance.

As a new adviser, I bring a fresh perspective to the financial services industry after developing an interest in the profession after the Mortgage Sure Principal helped my wife and I purchase our first home in late 2015.

I have a retail background with a strong customer first focus and understand the need for a tailored approach from client to client.

### **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/my internal complaints scheme so that I/my internal complaints scheme can try to fix the problem.

If we cannot agree on how to fix the issue, you can contact the Insurance and Financial Services Ombudsman ("IFSO") disputes resolution scheme of which I am a member. This service will cost you nothing and will help us resolve any disagreements.

You can contact Insurance & Savings Ombudsman Scheme at:

### **Insurance and Financial Services Ombudsman Scheme**

Web:

[www.ifso.nz](http://www.ifso.nz)

Phone:

0800 888 202 or 04 499 7612

Fax:

04 499 7614

Postal Address:

PO Box 10-845, Wellington 6143

### **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, Benjamin Peter Graham, 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: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

This Disclosure Statement, (version 2), was prepared on 12<sup>th</sup> of March 2018