

Disclosure document

Name of financial adviser Stephen Holdem
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This disclosure statement was prepared on 22 August 2018.

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 category 2 financial products such as fire & general insurance, life insurance, health insurance, risk insurance, consumer credit contracts, home loans, mortgages, and other insurance products.

I am a specialist mortgage broker and personal risk adviser and can provide you advice as well as transactional services relating to mortgages, fire & general insurance, life insurance, disability and medical insurance.

What should you do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service, please tell my internal complaints scheme so that my internal complaints scheme can try to fix the problem.

You may contact the internal complaints scheme by requesting a copy of our complaint service, which will explain the procedures required to resolve your complaint.

If we cannot agree on how to fix the issue, or if you decide not to use the internal complaints scheme, you can contact

The Insurance & Savings Ombudsman, P.O. Box 10 845, Wellington.
Free phone 0800 888 202 or Fax 04 499 7614

This service will cost you nothing, and will help us resolve any disagreements. You can contact Stephen Holdem

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How am I regulated by the government?

You can check that I am a registered financial adviser at <http://www.fspr.govt.nz>

The Securities Commission regulates financial advisers. Contact the Securities Commission for more information, including financial tips and warnings.

You can report information or complain about my conduct to the Securities Commission, 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, Stephen Holdem, 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

