

## Disclosure Statement

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### **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:**

The advice that I give is general in nature and is more about providing you a financial sounding board, helping you with your financial strategy and giving you some guidance on your overall financial position. I do not give advice on specific financial products and can refer you onto a number of specialists as and if required.

### **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 so that I can try to fix the problem. If we cannot agree on how to fix the issue you can contact a member of the approved dispute resolution scheme below. This service will cost you nothing, and will help us resolve any disagreements.

**The ISO Scheme:** Office of the ISO PO Box 10-845 Wellington 6143, Freephone: 0800 888 202

### **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, Lisa Dudson, 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.

