

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 category 2 financial products such as life insurance, health insurance, risk insurance, consumer credit contracts, home loans, mortgages, and other insurance products. I provide 'Class Advice' on KiwiSaver. I can give you advice about:

BUSINESS

KEY PERSON(S) – Insurance to include protecting business profit and debt commitments & advice on ACC contracts.

BUSINESS SHARE FUNDING – Insurance to provide funds for the transfer of shares when a shareholder is forced out of business due to the death or permanent disability.

COMMERCIAL FINANCE – Providing mortgage advice under Sure Mortgages Ltd, to facilitate the purchase of business premises a businesses or similar.

PERSONAL & FAMILY

INSURANCE ADVICE on products that cover Life, Trauma & Permanent Disability, Mortgage protection, Income protection and Medical insurance.

MORTGAGE AND HOMELOAN ADVICE under Sure Mortgages Ltd, to facilitate the purchasing residential homes and investment properties.

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 this issue, you may contact the external complaints scheme, Financial Services Complaints limited. This service will cost you nothing, and will help us resolve any disagreements. You can contact Financial Services Complaints Limited at—

Address: P O Box 5967, Lambton Quay, Wellington 6145

Telephone number: 0800 347 257

Email address: info@fscl.org.nz

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, Mark Atherley, 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:

A handwritten signature in black ink that reads "M. Atherley". The signature is written in a cursive style with a large, sweeping flourish at the end.

Date: