

Disclosure Statement
Registered Financial Adviser



Neville Montgomery

Financial Service Providers Register: 604509

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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. I specialise in the following:

- Life Insurance
- Mortgage Protection
- Income Protection
- Total Permanent Disability Cover
- Trauma/Critical Illness Cover
- Health Insurance
- Redundancy Cover
- Family Protection Cover
- Business Insurance
- Key Person Cover

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. We have an internal complaint process and if I am unable to promptly resolve your complaint it will be referred to our Head of Client Engagement Manager who will investigate the issues further.

Alternatively, you can contact our Head of Client Engagement Manager directly by:

Telephone: (09) 360 5620 | Email: feedback@peoplegroup.co.nz

Address: PO Box 47218, Ponsonby, Auckland 1144

If we cannot agree on how to fix the issue, or if you decide not to use the internal complaints scheme, you can contact Financial Services Complaints Limited ("FSCL") which I am a member of and is approved by the Ministry of Consumer Affairs. This service will cost you nothing, and will help us resolve any disagreements. You can contact FSCL at:

Address: Financial Services Complaints Limited, PO Box 5967, Lambton Quay, Wellington

Free phone: 0800 347 257 Fax: (04) 472 3728 Email: 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, Neville Montgomery, 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.

A handwritten signature in blue ink, appearing to read 'Neville Montgomery', is written over a faint, light blue circular stamp.

Signed

Dated 10/10/2018