

## Disclosure Statement Registered Financial Adviser



**Name of financial adviser:** Amy Lockett  
**Financial Service Providers Register:** FSP681211  
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**Trading name:** Insurance People Limited, Insurance People ( Fire and General Limited)

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This disclosure statement was prepared on: 30 July 2019

### 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. You may contact the internal complaints scheme by writing or telephoning our management team at:

Address: Insurance People, PO Box 47218, Ponsonby, Auckland 1144  
Telephone: (09) 360 5620 Fax: (09) 360 5621 Email: feedback@peoplegroup.co.nz

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, Tony Bakalich, 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, appearing to be "Tony Bakalich".

Dated: 30 July 2019