

## **DISCLOSURE STATEMENT**

**Joanne Walker**

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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, trauma insurance, income protection, home loans and mortgages. I specialise in personal risk and mortgage advice. I can provide you advice as well as transactional services relating to mortgages, 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 me so I can try to fix the problem. You may contact our internal disputes service by telephoning: 021 660307, by email: jo@trebla.nz, or in writing to PO Box 65495, Mairangi Bay, Auckland 0754.

If we cannot agree on how to resolve the issue, you can contact Financial Disputes Resolution Services (FDRS). This service will cost you nothing and will help us resolve any disagreements. You can contact FDRS by emailing [enquiries@fdrs.org.nz](mailto:enquiries@fdrs.org.nz), calling FDRS on 0508 337 337, or in writing FREEPOST 231075, PO Box 2272, Wellington.

## 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, Joanne Walker, 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: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

This Disclosure Statement, (version 03), was prepared on 04th July 2018