

Primary Disclosure Statement

Name	Lynda Taylor	Financial Service Provider Number 9762
Trading Names	Taylor Made Advice Ltd Trading as Taylor Made Insurance Solutions	
Address	4 Eric Price Avenue Takapuna 0620 PO Box 31-703, Milford, Auckland City 0741	
Phone	09 213 3422	
Mobile	021 667 934	
Email	lynda@taylormadeinsurance.net.nz	
Website	www.taylormadeinsurance.net.nz	

This document was prepared on 25 August 2017

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.

In addition to this information that I must disclose to you in this statement, I must also disclose other information to you in a separate disclosure statement, including information about the type of services that I provide, the fees that I charge, and any actual or potential conflicts of interest. If I have not provided that information to you at the same time as I give you this statement, I must provide it to you as soon as I can.

What sort of Adviser am I?

I am an Authorised Financial Adviser. This means I have been authorised by the Financial Markets Authority (*the government agency that monitors financial advisers*) to provide the financial adviser services described below.

How can I help you?

I have been authorised to provide you with financial adviser services of the following categories:

- Financial Advice
- Financial Planning

When I provide this service I will be giving your advice about financial products provided by:

- Financial products provided by **only 1 organisation**
- Financial products provided by a **small number of organisations** (2 to 5 organisations)
- Financial products provided by a **broad range of organisations** (more than 5 organisations)

How do I get paid for the services that I provide to you?

Payment type	Description
<input type="checkbox"/> Fees only	My services are only paid for by fees that you pay. I do not receive payments from other people or organisations that might influence my advice.
<input type="checkbox"/> Fees	My services are paid for by the fees that you pay as well as in other ways.
<input checked="" type="checkbox"/> Commissions	I will be paid by other organisations. How much that payment will be depends on the decisions you make.
<input type="checkbox"/> Non-financial benefits	Other organisations may give me non-financial benefits depending on the decisions that you make.

I am required to tell you the specific fees, commissions, extra payments, and other benefits that I have received or will, or may, receive in relation to the services that I provide to you. I must tell you these things before I give you advice or, if that is not practicable, as soon as practicable after I have given you that advice.

What are my obligations?

As an Authorised Financial Adviser, I must comply with the Code of Professional Conduct for Authorised Financial Advisers. I also have other obligations under the Financial Advisers Act 2008 (including regulations made under that Act) and under the general law.

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 resolve the issue, you can contact our Dispute Resolution Provider:

Financial Services Complaints Ltd (FSCL) at:

Address PO Box 5967, Lambton Quay, Wellington 6145
13th floor, 45 Johnston Street, Wellington
Telephone 0800 347 257
Email info@fscl.org.nz
Web www.fscl.org.nz

This service will cost you nothing and will help resolve any disagreements.

If you need to know more, where can you get more information?

If you have a question about anything in this disclosure statement or you would like to know anything more about me, **please ask me**. If you have a question about financial advisers generally, you can contact the Financial Markets Authority

How am I regulated by the Government?

You can check that I am a registered financial services provider and an Authorised Financial Adviser at <http://www.fspr.govt.nz>

The Financial Markets Authority authorises and 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 first to use the dispute resolution procedures described above (under What should you do if something goes wrong?)

Declaration.

I, Lynda Ann Taylor, 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:-

