

Important Information

about your Risk Insurance Adviser



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What sort of adviser am I?

I am a Financial Adviser providing advice on behalf of Quantum Finance BOP Ltd – FSP 1003172

Quantum Finance BOP Ltd is an Authorised Body of Quantum Finance Ltd who is the Financial Advice Provider
Licence holder 751471

My qualifications

Level 5 NZCFS–Life, Disability & Health Specialist Strand & Investment Strand
Diploma of Management, Certificate in Coaching & Mentoring, MBA–Business

My duties

I am bound by the duties of the Financial Markets Conduct Act to meet the standards of competence, knowledge and skill as set out in the Code of Conduct for Financial Advice Providers.

I give priority to my clients' interests and I exercise care, diligence and skill. I meet the standards of ethical behaviour, conduct and client care as set out in the Code of Conduct.

Accreditations

- ACCURO
- AIA
- ASTERON
- CIGNA
- FIDELITY
- PARTNERS LIFE
- NIB

Professional memberships

I am a current member of the NZFSG (New Zealand Financial Services Group) Aggregation Group and am a participating member of the Financial Services Complaints Ltd (FSCL) Disputes Resolution Group.

Further Information

Full details on Fees & Expenses, Conflicts of Interest, and how we handle complaints, are on our website: [www.quantumgroup.nz /our-obligations/](http://www.quantumgroup.nz/our-obligations/)

This information is available in writing. Please email the address below if you would like a copy.

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W: quantumgroup.nz

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