

# Disclosure Statement (Financial Adviser)

**Name of Financial Adviser:** Jackie Wallace  
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PO Box 1144, Whangarei 0140  
**Trading Name:** Adams Trimmer Insurance (1992) Limited  
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This Disclosure Statement was prepared on 12 July 2016.

## 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 authorized, financial adviser.

I can give you advice about any Category 2 product (Fire and General Insurance Products, or risk related Life Insurance Products).

## What should you do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service, please tell my internal complaints scheme so that my internal complaints scheme can try to fix the problem.

You may contact the internal complaints scheme by telephoning David Wech on 09 470 2244 or by email [david@adamstrimmer.co.nz](mailto:david@adamstrimmer.co.nz) or by writing to internal complaints, Adams Trimmer Insurance Limited, PO Box 1144, Whangarei, 0140.

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

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  
**Address:** PO Box 5967, Lambton Quay, Wellington, 6145  
**Telephone Number:** 0800 347 257  
**Email Address:** [info@fscl.org.nz](mailto: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, Jackie Wallace, 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:

