

Disclosure Statement for David Pottinger Risk Adviser at Optimalife Ltd

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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 personal risk management. This includes solutions such as life, medical, income protection and trauma insurance and how these solutions best fit your specific personal or business situation.

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 phoning 027 501 6016, by email to info@optimalife.co.nz or in writing to Optimalife Ltd, 29 Halswell Junction Rd, Halswell, Christchurch 8025.

If we cannot agree on how to resolve the issue, you can contact our external Disputes Resolution Service – the Insurance & Financial Services Ombudsman Scheme Inc. This service will cost you nothing, and will help us resolve any disagreements. You can contact the Insurance & Savings Ombudsman via their website which is www.ifso.nz or emailing info@ifso.nz, or calling the Insurance & Financial Services Ombudsman Scheme Inc on 0800 888 202, or in writing to: Insurance & Savings Ombudsman, P O Box 10845, WELLINGTON 6143. Our Member number with IFSO is 1004674.

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. Our registration number is FSP539326.

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, David Pottinger 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: ____/____/____