

## Disclosure statement

**Dated 3/3/2017**

Name of financial adviser: Adrian Phillips  
Address: 261 Cambridge Avenue, Ashhurst, Palmerston North, 4810  
Trading name: Phoenix Adviser Group Ltd.  
Telephone number: 021 487 497  
Email address: [adrian@phoenixadvisergroup.co.nz](mailto:adrian@phoenixadvisergroup.co.nz)

This disclosure statement was prepared on: 15<sup>th</sup> December 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 authorised, financial adviser.

I can give you advice about;

Life Insurance	Provide financial security in the event of my death
Trauma cover	Provide a Lump Sum in the event of a major trauma
Mortgage Protection	Provides a monthly payment in the event of you being unable to work due to disability or redundancy
Income Protection Insurance	Maintain your income in the event of you being unable to work due to disability
Key person	Provide cover for key people in your business
Total & Permanent Disablement	Provide a lump sum in the event of never working again
Health Insurance	Provide access to immediate health care
Fire and General Insurance	Cover for personal effects through fire cover
Fire and General for business	Cover for my business assets
Travel Insurance	Cover for your holidays
Kiwi Saver	Kiwi Saver scheme Class Advice Only

### **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.

You may contact Phoenix Advisers Group Ltd. internal complaints scheme by either telephoning 021 487497, emailing [adrian@phoenixadvisergroup.co.nz](mailto:adrian@phoenixadvisergroup.co.nz) or by writing to

Phoenix Adviser Group Ltd. P.O. Box 91 Ashhurst, Palmerston North 4810 explaining what the issue is.

If we cannot agree on how to fix the issue, or if you decide not to use the internal complaints scheme, you can contact IFSO. This service will cost you nothing, and will help us resolve any disagreements. You can contact IFSO at:

Insurance & Financial Services Ombudsman Scheme Inc

T 0800 888 202 | DDI 04 917 5615 | PO Box 10 845, Wellington 6143

### **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, Adrian Phillips, 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:

Adrian Phillips