

# Primary Disclosure Document

Registered Financial Adviser



**Name:** Alan Bainbridge

**FSP Number:** 453447

**Mobile:** 021 103 8870

**Email:** alan@tmbl.co.nz

**Address:** 10 Linklater Ave, Tauranga

**Trading Name:** Tauranga Mortgage Brokers 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 your personal and business finance requirements and life risks. This includes an analysis of your current lifestyle and / or business situation with a written report detailing the proposed financial solutions required to meet your goals. These products can include (but are not limited to):

### Personal Solutions

- Residential Finance Applications
- Fixed Rate Facilities
- Interest Rate & Loan Structure Options
- Transactional Revolving Credit/Reducing Facilities
- Construction/Renovation Loans
- Bridging Finance & Short Term Lending

### Business Solutions

- Commercial Property Finance
- Business Lending
- Investment Property Finance
- Short Term Finance

## What should you do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service, please contact our internal disputes manager, Tracey Robinson so that we can try to resolve the problem.

You can contact Tracey Robinson at Tauranga Mortgage Brokers Ltd by emailing: [tracey@tmbl.co.nz](mailto:tracey@tmbl.co.nz) or by phone on 07 552 6069 or 027 577 0314.

If we cannot agree on how to resolve the issue, or if you decide not to use the internal complaints scheme, you can contact the Insurance & Financial Services Ombudsman Scheme (IFSO). This service will cost you nothing, and will help us resolve any disagreements.

## You can contact the IFSO at:

PO Box 10-845

Wellington 6143

New Zealand

Freephone: 0800 888 202

Email address: info@ifso.nz

## How am I regulated by the Government?

You can check that I am a registered financial provider 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 (see **What should you do if something goes wrong?**)

## Declaration

I, Alan Bainbridge, 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 \_\_\_\_\_