

Your KiwiSaver Adviser:

Complaints Resolution Process

Our Commitment

We are committed to handling complaints fairly, transparently and as quickly as practicable.

If you are unhappy with our service or the financial advice you have received, we encourage you to let us know so we have the opportunity to resolve your concerns.

You can contact us by:

Email: Connor@yourkiwisaveradviser.co.nz | Phone: +64 27 426 6669

Making a complaint

You can make a complaint by contacting us using the details above by phone, email or in writing. If you need assistance making your complaint, please let us know and we will do our best to help.

What happens next

Once we receive your complaint we will:

- 🦹 acknowledge your complaint within two business days
- 🦹 assign a reference number
- 🦹 investigate your concerns fairly and objectively
- 🦹 contact you if we require any further information
- 🦹 aim to provide a written outcome within ten working days where practicable.

If we need additional time to investigate your complaint, we will explain why and provide you with updates at least every five working days until the matter is resolved.

Putting things right

Where appropriate, we will take reasonable steps to resolve your complaint and, where necessary, provide appropriate remediation.

We record all complaints and use them as part of our continuous improvement process to identify trends, address root causes and improve our services.

Independent Disputes Resolution

If you are not satisfied with the outcome of our complaints process, you may refer your complaint to our independent dispute resolution scheme at no cost to you.

Insurance & Financial Services Ombudsman (IFSO Scheme): 0800 888 202 | info@ifso.nz | www.ifso.nz

Our IFSO membership number: 5008446

Privacy

We handle personal information relating to complaints in accordance with our Privacy Policy.

If a complaint involves a privacy matter or a notifiable privacy breach, we will manage it in accordance with our obligations under the Privacy Act 2020.

Questions

If you have any questions about this Complaints Policy or wish to discuss a concern before making a formal complaint, please contact us.