



Your KiwiSaver Adviser: *Disclosure Statement*

About Your KiwiSaver Adviser (FSP1011831)

Who we are

Your KiwiSaver Adviser (YKA) is licensed by the Financial Markets Authority (FMA) to provide regulated financial advice to retail clients. We specialise in KiwiSaver advice only.

How we can help (nature and scope of our advice)

- Advice about KiwiSaver scheme selection and fund choice (Milford, Generate, Booster).
- We do not provide advice on other investment products, lending, insurance, or taxation.

Fees and how we're paid

- We are generally paid by product provider commissions if you proceed with our recommendation. If we agree a client-paid fee, we will confirm this in writing before you proceed.
- Your Statement of Advice will set out estimated commission in dollars where practicable.

Conflicts of interest and how we manage them

We maintain a Conflicts & Incentives Register and have controls to ensure our advice prioritises your interests. If a conflict cannot be effectively managed, we will decline to proceed.

Our duties to you

We, and anyone who gives financial advice on our behalf, are bound by the Code of Professional Conduct for Financial Advice Services to:

- treat you fairly, act with integrity, give advice that is suitable, ensure you understand the advice, and protect your information; and
- maintain the competence, knowledge and skill for the advice provided; and
- follow the other standards set out in the Code.

Complaints and disputes

If you have a complaint, please contact us:

- Email: connor@andersonfinancialservices.co.nz
- Phone: +64 27 426 6669

We'll acknowledge your complaint within 2 business days and aim to provide a written decision within 10 working days where practicable. If we can't resolve your complaint, you can refer it to the IFSO Scheme at no cost:

IFSO Scheme — 0800 888 202 | info@ifso.nz | www.ifso.nz

Our IFSO membership number: 5008446

Contact us

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