

# DISCLOSURE STATEMENT

## FINANCIAL ADVISOR STATEMENT



This Disclosure Statement provides you important information about me in my capacity as a Financial Adviser employed by Hazlett Insurance Limited.

### Contact Details

I am a Financial Adviser and I give financial advice on behalf of Hazlett Insurance Limited (Hazlett Insurance). Please find my contact details below:

Name	Tracey Gerken
Registration number	626289
Postal Address	PO Box 39162, Harewood, Christchurch 8045
Phone	03 358 7246
Email	tgerken@hazlett.nz

### Nature and Scope of Advice

Our advice is specific and limited to fire and general insurance products. In providing the advice we do so on behalf of Hazlett Insurance. We will advise you on the products provided by insurance companies. Further details on our services are available in the Terms of Business and Financial Adviser Provider Disclosure Statement on our website <https://www.hazlett.nz/insurance/>

### Reliability History

Neither I nor Hazlett Insurance have been subject to a reliability event. A reliability event is something that might materially influence you in deciding whether to seek advice from myself or Hazlett Insurance.

### Administration Fees

Hazlett Insurance may charge an administration fee for the advice given to you and for implementing that advice if you instruct us to place insurances as recommended. This administration fee is based on the amount of work and time required to provide our advice to you and will be shown on our invoice, payable on payment of your premium. The amount of this fee will be disclosed when we provide our recommendations to you.

### Commissions

We receive commission from the insurance providers of the policies that we place with them, on your behalf. The commission will range from 7.5% to 25% of the premium they charge and which is payable by you, the amount of which will depend on the insurance company and policy you choose. The amount of this commission will be disclosed to you when I provide the advice to you.

A commission may be received where we refer a Life & Health Insurance provider.

### General

We ensure we prioritise your interests above our own, by following an advice process that ensures our recommendations are made on the basis of your goals and circumstances. We complete training to understand and manage conflicts of interest. We maintain a register of conflicts of interests and any gifts and other incentives that we may receive. We review our compliance programme annually.

A handwritten signature in black ink, appearing to read "Tracey Gerken".

Tracey Gerken

