

Important Information

about your Financial Adviser

Name: Amy McPhee
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What sort of adviser am I?

I am a Financial Adviser providing advice on behalf of Quantum Finance NZ Ltd - **FSP 748272**, and Quantum Risk Ltd - **FSP 558167**

Quantum Finance NZ Ltd is an Authorised Body of Quantum Finance Ltd who is the Financial Advice Provider
Licence holder 751471

My qualifications

Level 5- NZ Certificate in Financial Services, specialising in:

- Residential Property Lending
- Life, Disability & Health Insurance

Quantum Risk Ltd is an Authorised Body of Quantum Finance Ltd who is the Financial Advice Provider
Licence holder 751471

My duties

I am bound by the duties of the Financial Markets Conduct Act to meet the standards of competence, knowledge and skill as set out in the Code of Conduct for Financial Advice Providers. I give priority to my clients' interests and I exercise care, diligence and skill. I meet the standards of ethical behaviour, conduct and client care as set out in the Code of Conduct.

Accreditations

Banks, Lenders & Providers I'm accredited with:

- | | | | | |
|------------|---------------------|------------------------|----------------------|-------------------|
| • ANZ | • ASAP Finance | • Cressida Capital | • Liberty Financial | • Unity |
| • ASB | • Avanti Finance | • DBR | • Pallas Capital | • Vincent Capital |
| • BNZ | • Basecorp | • Finbase | • Plus Finance | • XCEDA |
| • Kiwibank | • Bizcap | • First Mortgage Trust | • Prosopa | • XE |
| • TSB | • CMFL | • Funding Partners | • Southern Cross | |
| • Westpac | • Co-Operative Bank | • Heartland Bank | • The Lending People | |

Providers I'm accredited with



Professional Memberships

I am a current member of the **KAN** (Kiwi Adviser Network) Mortgage Aggregation Group, and I am a participating member of the **Financial Services Complaints Ltd (FSCL)** Disputes Resolution Group.

Further Information

Full details on Fees & Expenses, Conflicts of Interest, and how we handle complaints, are on our website: www.quantumgroup.nz/our-obligations/

This information is available in writing. Please email the address below if you would like a copy.

HQ: B2/99 Greenwood Street, Frankton, Hamilton 3204

W: quantumgroup.nz

P: 0800BROKER

E: customerservice@quantumgroup.nz