

Disclosure Statement

Name of Financial Adviser: **Martyn Todd**

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Trading Name: **Marlin Solutions Ltd**

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Marlin Solutions Ltd
FINANCIAL SERVICES PROVIDER
" HOOK INTO GOOD VALUE AND GREAT ADVICE "

◆ 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 Advisor that you choose.

◆ What sort of Advisor am I?

I am a Registered but not an Authorised Financial Adviser.
I can give you advice about:

Debt Management: M-Power from Fortifi including "personalized" Debt Management Plans, Xero for monitoring. We also provide training & support to help you achieve your financial goals & reduce interest costs, and be debt free faster.

Risk Protection:

- ◆ Life Cover -Term Life, Level Life and Monthly Life Cover
- ◆ Mortgage Protection & Mortgage Repayment Cover
- ◆ Redundancy Protection
- ◆ Total & Permanent Disability Cover
- ◆ Disability Income Protection
- ◆ Crisis or Trauma Cover
- ◆ Health Insurance
- ◆ Business Cover-Key Person Cover, Business Continuity

Mortgage Advice: Advice on the best provider and structure for your circumstances. New Mortgages, Top-ups, Restructures, Refixes and Re-financing.

KiwiSaver: I can provide class information about *Generate* KiwiSaver scheme.

Domestic Insurance: House, Car and Contents Insurance.

◆ What should you do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service, please tell internal complaints scheme, so that my internal complaints scheme can try to fix the problem.

You may contact the internal complaints scheme by emailing complaints@marlinsolutions.co.nz . If we cannot agree on how to fix the issue or if you decide not to use the internal complaints scheme, you can contact the Insurance and Financial Services Ombudsman Scheme Inc. ("IFSO scheme"). This service will cost you nothing and will help us resolve any disagreements.

You can contact the IFSO scheme at:

Address: Insurance & Financial Services
Ombudsman
PO Box 10-845
Wellington, 6143
Phone : 04 499 7612
Freephone: 0800 888 202
Website : www.ifso.co.nz
Email: info@ifso.nz

◆ How am I regulated by the government?

You can check that I am a Registered Financial Advisor at www.fspr.govt.nz

The Financial Markets Authority regulates financial advisors. 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 disputes resolution procedures described above under:

(What should I do if something goes wrong?).

◆ Declaration

I Martyn Todd, declare to the best of my knowledge and belief the information contained in this disclosure statement is true and complete and complies with the disclosure statement requirements in the Financial Advisors act 2008 and the Financial Advisors (disclosure) Regulation 2010.

Signed:



MARLIN SOLUTIONS LTD

P: (07) 929 2296 Mob: 027 4550 469
Find out more on our website
www.marlinsolutions.co.nz



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