



Disclosure statement for Naylon Cassidy

This disclosure statement was prepared on the 12th of April 2017.

I am a registered, but not authorised, financial adviser. I can give you advice about products such as life insurance, health insurance, risk insurance, consumer credit contracts, home loans, mortgages, and other insurance products. I specialise in the area of mortgages, personal risk management and life insurance. I have worked 16 years within the financial service industry.

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 adviser that you choose.

Contact Naylon

Email Naylon_Cassidy@floatup.co.nz
Phone 029 200 3711
Address Suite 2, 161 Neilson Street, Onehunga, Auckland
Postal Suite 2, 161 Neilson Street, Onehunga, Auckland
Web www.floatup.co.nz

How am I regulated by the Government?

You can check that I am a registered financial adviser at <http://www.fspr.govt.nz>. The Financial Markets Authority regulates financial advisers. 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 dispute resolution procedures described above (under "What should you do if something goes wrong?").

What should you do if something goes wrong?

If you have a problem, concern, or complaint about any part of my service, please tell me so I can try to fix the problem. You may contact our internal disputes service by telephoning 021 500 838, by email info@floatup.co.nz, or in writing to 161 Neilson Street, Onehunga.

If we cannot agree on how to resolve the issue, you can contact Financial Services Complaints Limited. This service will cost you nothing, and will help us resolve any disagreements.



Declaration

I, Naylon Cassidy, declare that, to the best of my knowledge and belief, the information contained in this disclosure statement is true and complete and complies with the disclosure requirements in the Financial Advisers Act 2008 and the Financial Advisers (Disclosure) Regulations 2010.

Signed: _____ 

Date: 12/04/17