



Important information about me and how I work

My name is Jade Baker. I provide advice on behalf of Quantum Financial Advisers who is the Financial Advice provider License Holder. I hold a New Zealand Certificate in Financial Services (Level 5) V2 – Investment.

My contact details

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Areas I can provide personal advice

The following are the areas of advice that I can provide:

KIWISAVER

- KiwiSaver education and advice

I source KiwiSaver products from the following companies:

- Generate

My duties and obligations to you

I have duties and obligations under the Financial Markets Conduct Act 2013 relating to the way I give advice. I am required to:

- Ensure you understand the nature and scope of service you ask me to provide
- Provide a service and advice that is relevant to this scope of service and suitable to your circumstances and needs
- Listen to your needs, concerns, preferences and to treat you fairly and with respect
- Act with integrity and give priority to your interests and give advice not influenced by our own interests
- Exercise care, diligence and skill in providing you with advice
- Meet the necessary standards of competence, knowledge and skill to provide you with the advice requested

- Ensure you understand my advice and recommendations and any associated risks
- Keep you informed along the way and communicate in a timely, clear and effective manner

This is only a summary of the duties I have, more information is available by visiting the Financial Markets Authority website <https://www.fma.govt.nz>