

## Disclosure Statement (Financial Adviser)

**Name and registration number  
of Financial Adviser:**

Paul Michaelsen - FSP576687  
(Known as Paul Michaelsen)

**Address:**

52 Fairview Place  
Havelock North  
Hastings 4130

**Trading Name**

Hawkes Bay Mortgage & Insurance Ltd T/A SHARE

**Telephone number:**

027 7472856

**Email address:**

paul.michaelsen@sharenz.com

This disclosure statement was prepared on 14 May 2020.

### 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.

### What sort of adviser am I?

I am a registered, but not authorised, financial adviser.

I can give you advice about:

- A contract of insurance (to cover financial consequences of untimely death, trauma, disability or illness), an investment linked contract of insurance (which is not a security), and a policy of life or endowment or annuity issued before 1 January 2009.
- Loans for personal, domestic, or household purposes (such as home loans. These are consumer credit contracts within the meaning of the [Credit Contracts and Consumer Finance Act 2003](#)).
- Kiwisaver in the form of Class Advice. Class Advice is defined as advice that is not personalised. It is advice that is generic to an audience, for example in a brochure or seminar, or dealing with “most people who” have certain characteristics.

### 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 or my internal complaints scheme so that my internal complaints scheme can try to fix the problem.

You may contact the internal complaints scheme by calling 0508 274273 or email [complaints@sharenz.com](mailto:complaints@sharenz.com).

If we cannot agree on how to fix the issue, or if you decide not to use the internal complaints scheme, you can contact Insurance & Financial Services Ombudsman. This service will cost you nothing and will help us resolve any disagreements. You can contact Insurance & Financial Services Ombudsman at:

Physical Address: Level 8, Shamrock House, 79-81 Molesworth Street, Wellington 6011

Postal Address: PO Box 10-845, Wellington 6143

Freephone number: 0800 888 202

Email address: [info@ifso.nz](mailto:info@ifso.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?**).

## Declaration

I, Paul Michaelsen, 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:



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Paul Michaelsen  
**Registered Financial Adviser**

Appendices: A. Client acknowledgement

**Appendix A**

**Client acknowledgement**

I / We, \_\_\_\_\_ and \_\_\_\_\_  
acknowledge receipt of the Disclosure Statement dated 14 May 2020 for Paul Michaelson.

Signed: ..... Date: .....

Signed: ..... Date: .....