



Important information about me and how I work

My name is Kelli Morris. I provide advice on behalf of Quantum Financial Advisers who is the Financial Advice provider License Holder.

My contact details

Registration numbers	Kelli Morris	FSP No. 119347
	Quantum Financial Advisers	FSP No. 729991
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Areas I can provide personal advice

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

LENDING

- Budget advice

KIWISAVER

- Kiwisaver education

I source Kiwisaver products from the following companies:

- Booster
- NZ Funds

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>

Quantum Financial Advisers belongs to a professional organisation, Financial Advice New Zealand and our advisers are required to abide by their professional standards.