



## 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

Registration numbers	Jade Baker	FSP No. 1001284
	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:**

#### **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>

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