

COMPLAINTS & DISPUTES - DISCLOSURE STATEMENT

Important FMA licencing information:

Getting The Balance Right Ltd (FSP 689291), trading as Balance Advisors, is a Financial Advice Prover regulated by the Financial Markets Authority. Getting The Balance Right Ltd t/a Balance Advisors is authorised under the licence of NZ Financial Services Group Limited (FSP286965) to provide financial advice.

Complaints and disputes:

If you are not satisfied with our service or financial advice, please tell us as soon as possible so that we can try and resolve this for you to the best of our ability. It is our intention to provide the best possible service and advise we can for our clients and will do our best to try and resolve any complaint received as quickly and effectively as possible.

You can make a complaint by:

Call: 0800 120 449
Email: support@balanceadvisors.co.nz
Write to: Getting The Balance Right Ltd t/a Balance Advisors
PO Box 834
Whangarei 0140

We will follow our internal complaint process:

- We will consider your complaint and let you know how we intend to resolve it. We may need to contact you to get further information about your complaint. Where possible, we try to resolve your complaint immediately.
- If we are unable to resolve your complaint immediately, we will acknowledge your complaint within 2 business days. We may contact you to get further information about your complaint.
- We aim to resolve complaints within 10 working days of receiving them. If we need more time to investigate your complaint, we will let you know when you can expect to receive a response to your complaint.
- We will contact you by phone, email, and/or letter to let you know whether we can resolve your complaint and how we propose to do so.

If we cannot agree how to resolve your complaint, or if you decide not to use our internal complaints process, you can contact our external disputes resolution scheme, Financial Services Complaints Ltd (FSCL). They provide a free and independent dispute resolution service that may help investigate or resolve your complaint if we have not been able to resolve your complaint to your satisfaction.

Call: 0800 347 257
Email: complaints@fscl.org.nz
Write to: Financial Service Complaints Limited
PO Box 5967
Lambton Quay
Wellington 6145