



Disclosure Statement

Name and registration number of Financial Adviser: Christel Maurer FSP775371

Trading as - The Money Journey

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How can I help you?

I provide the following advice:

- Financial advice & strategies
- Budget coaching

When I do this, I will be able to give you advice about

financial products provided by only 1 organisation

financial products provided by a small number of organisations (2 to 5 organisations)

financial products provided by a broad range of organisations (more than 5 organisations)

How do I get paid for the services that I provide to you?

Fees only – My services are only paid for by the fees that you pay. I do not receive payments from other people or organisations that might influence my advice.

Commissions

Non-financial benefits from other organisations



What are my obligations?

As a Financial Adviser, I must comply with the Code of Professional Conduct for Financial Advice Services and the Financial Markets Conduct Act 2013. I am required to:

- give priority to your interests by taking all reasonable steps to make sure our advice isn't materially influenced by my own interests.
- exercise care, diligence, and skill in providing you with advice.
- meet specific standards of competence, knowledge and skills.

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 so that I can try to fix the problem. You can email me at christel@themoneyjourney.co.nz

If we cannot agree on how to fix the issue, you can contact Insurance & Financial Services Ombudsman (IFSO). This service will cost you nothing, and will help us resolve any disagreements.

You can contact Insurance & Financial Services Ombudsman (IFSO) at:

Address: IFSO Scheme, PO Box 10-845, Wellington 6143

Phone: 0800 888 202

Email address: info@ifso.nz

How am I regulated by the Government?

I am registered on the Financial Services Provider Register (FSPR) under the number FSP775371. You can check at fspr.govt.nz

Declaration

I, Christel Maurer, 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 the Financial Markets Conduct Act 2013 and the Code of Professional Conduct for Financial Advice Services.

Signed: *Christel Maurer*

Date: 4th July 2022