



## Financial Advice Provider (FAP)

### Disclosure Statement

Prepared on 15 March 2021

### Our contact details

Full Name: Pinnacle Life Limited

Trading Name: Pinnacle Life

Post: PO Box 1471, Auckland 1140

Principal Place of Business: Level 2, Gillies Avenue Office Park, 27 Gillies Avenue, Newmarket, Auckland 1023

Phone: 0800 22 22 23

Fax: 09 522 5518

Email: [ask@pinnaclelife.co.nz](mailto:ask@pinnaclelife.co.nz)

PO Box 1471, Auckland 1140

Ph 09 522 5515

Fax 09 522 5518

Freephone 0800 22 22 23

Freefax 0800 746 777

[ask@pinnaclelife.co.nz](mailto:ask@pinnaclelife.co.nz)

[pinnaclelife.co.nz](http://pinnaclelife.co.nz)

**It's important that you read this information**– it provides important information about Pinnacle Life's financial advisers and should help you decide which financial adviser to choose.

### What sort of adviser are we?

Pinnacle Life is a Financial Advice provider (FAP). It is licensed and regulated by the Financial Markets Authority (FMA) for its financial adviser and Digital Advice services. Pinnacle Life also holds a licence to conduct insurance business granted by the Reserve Bank of New Zealand. Employees of Pinnacle Life (our Nominated Representatives) may provide you with financial adviser services relating to our products and services.

As a FAP, Pinnacle Life takes responsibility for the financial adviser services you get from our Digital Advice platform and our Nominated Representatives (our employees). We exercise care, diligence and skill in providing financial adviser services to you. Our advisers do not receive commissions or incentives.

### What products and services can we provide for you?

Pinnacle Life provides financial adviser services for our insurance products through our Nominated Representatives. These services relate to the following insurance product classes:

- Life Insurance
- Funeral Insurance
- Critical Illness (Trauma) Insurance
- Income Protection Insurance
- Total & Permanent Disability Insurance



## What should you do if something goes wrong?

Our goal is to provide our customers with the highest level of service we can, but there may be a time when you might encounter a problem or have a concern. If this happens, please let us know immediately. You can contact us either by calling one of our Customer Service Representatives on **0800 22 22 23**, or emailing us on [ask@pinnaclelife.co.nz](mailto:ask@pinnaclelife.co.nz)

In many cases, your issue can be resolved straight away by our customer service team. However, if they can't resolve the issue, our Customer Sales & Service Team Leader will personally take on your case.

Alternatively, you are welcome to put your concern in writing. We will undertake a thorough investigation of your concern and work with you to try and resolve the issue. If we can't find a way to resolve your concerns, you can also contact the Insurance and Financial Services Ombudsman (IFSO), who may be able to help.

The IFSO is a free, independent service for resolving insurance and financial disputes. Pinnacle Life is a member of the IFSO. Helpful information concerning the IFSO and their role in complaint resolution can be found on their website [www.ifso.nz](http://www.ifso.nz).

### ***IFSO contact details***

Post: P O Box 10 845, Wellington 6143

Physical Address: Level 2, Solnet House, 70 The Terrace Wellington 6143

Phone: 0800 888 202

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

You can also obtain information about financial advisers from the FMA and report information about Pinnacle Life to the FMA if you have concerns.

### ***FMA contact details***

Post: PO Box 1179, Wellington 6140

Phone: 0800 434 566

Web: [www.fma.govt.nz](http://www.fma.govt.nz)

Pinnacle Life is registered on the Financial Service Providers Register. If you're interested, you can check our status on the register at [www.fspr.govt.nz](http://www.fspr.govt.nz)

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