

INSURANCE ADVISER – ABOUT US

My role

As an Insurance Adviser, my role is to provide you with advice on life, health and/or disability insurance matters and products that may be suitable for you. I will meet with you as agreed to review your financial products and discuss any important changes. Any information you provide me with will be used to assess your requirements, taking into account suitability of products based on your risk profile, individual needs and financial circumstances.

Confidentiality & Privacy

We appreciate that as a customer, you trust us with your personal information and we take your privacy very seriously. Any information you provide will be kept confidential and will be securely held. In handling your personal information, we will always comply with the Information Privacy Principles under the Privacy Act 1993 and, where applicable, any policies and codes of industry groups to which we belong. To administer, manage and monitor any services provided to you, we may need to disclose your information to or make enquiries about you from carefully selected third parties that we have an ongoing relationship with, and who are subject to confidentiality obligations. For further information, please see our full privacy policy on our website www.onepath.co.nz/privacy or contact us on 0508 464 999.

What can you expect from me, as an Insurance Adviser?

- Guidance in completing any paperwork for the life, health and/or disability products you select.
- Compliance with all applicable laws relating to the financial advice I provide you.
- Confidentiality in regard to all information you provide me with unless I am required by law to disclose it or you give me authority to do so.
- Periodic offers to review your insurance needs and assistance at claim time.

What do I expect from you?

- Upfront and accurate disclosure – don't forget to give me any information that is known to you or that you think could be relevant to my assessment of your needs and any subsequent application. Without accurate information, I won't be able to provide you with advice that is well suited to your needs.
- It is also important that you keep me updated if and when your circumstances change – so I can make sure your products remain well-suited to meet your changing needs. Examples include: change of address, change in your occupation, change in your number of dependants etc.
- Don't forget that you are responsible for the accuracy of any documents relating to your application - I cannot sign any documents on your behalf.