

Disclosure Document

Eunice Wallace

I am a registered financial adviser, and am accredited with the New Zealand Financial Services (NZFS). I am also a member of Financial Services Complaints Ltd (FSP #24262, FSCL #15).

I am the broker for:

- ANZ
- Co-operative Bank
- Sovereign
- Liberty Finance
- Westpac
- TSB
- DBR
- Avanti Finance
- ASB
- SBS
- Resmac
- BNZ

Services

My services include providing advice and assistance regarding:

- Mortgages for first home buyers
- Refinancing
- Mortgages on residential and commercial investment properties
- Mortgage insurance and trauma insurance

Qualifications and Experience

- Graduated from the University of Canterbury, and majored in Accounting and Business Finance.
- Have been a mortgage broker since April 2003; working with Wizard Home Loans for the first six years, and then running own business (trading under Viva Home Loans) after then.

Awards

- Was number 1 broker in the South Island with ANZ Bank for 2014.
- Was number 1 broker in the Canterbury/Westland area with Westpac Bank for both 2013 and 2014.
- Was awarded twice by the Wizard Home Loans as the Top Mortgage Broker during 2004-2009.

What you should do in case of grievance

If you have a concern or complaint about my services, please contact me and I will endeavour to fix the problem. I can be contacted at eunice@eunicewallace.co.nz or 03 354 4468. Alternatively, you can contact the NZ Financial Group Services (Brent McGregor, 04 939 0807).

If we cannot reach an agreement, or if you decide not to use the internal complaints scheme, you can contact the Financial Services Complaints Ltd (FSCL).

Declaration

I, Eunice Wallace, declare that, to the best of my knowledge and belief, the information contained in this Disclosure Document is true and complete, and complies with the disclosure requirements stipulated in the Financial Advisers Act 2008 and the Financial Advisers (Disclosure) Regulations 2010.