

Don't wait to find out how good your insurance is at the worst possible time.

Services we don't provide, but can refer to you:

- Accounting Advice
- Business Coaching
- Mortgages & Finance Packages
- Financial Planning
- General Insurance - Private & Business
- Legal Advice
- Property Investment
- Sales Training
- Technical Writing
- Wills & Trusts

Insurance Products



Life



Trauma



Income



Medical



Business



Personal



Introducing
David McGuffie

Please pass my contact details onto the relevant supplier.
I would like someone who provides the services I have selected to contact me.

Signature

David McGuffie

Advanced Insurance Ltd

86 Ford Road, Business Park

Onekawa, Napier, New Zealand

Phone: +64 6 8337 669 Fax +64 6 8337 668

Email: david@advancedinsurance.co.nz

Experience, Qualifications and Professional Bodies

David McGuffie is the owner and founder of Advanced Insurance Ltd. He has been in business as an insurance broker since September 2001 and is a member of the Life Brokers Association.

How David Operates



Using the Advanced Five-Step Process, David will:

1. ask you questions to understand your requirements and ascertain the facts
2. advise on the risks that you may want to consider and products that reduce these risks
3. take the time to ensure that you understand his advice and the options available to you. Some clients require a number of meetings to gain clarity.
4. using Strategy's independent toolbox, advise on an insurance solution that fits your present and future requirements, and
5. on receiving your instruction, proceed with implementing your policies; keeping you fully informed throughout the underwriting process.

And it doesn't end there, each year, Advanced Insurance will be in touch to remind you about your annual review. We will be there over the lifetime of our relationship — staying in touch as your family and business requirements change.

Material Interests, Relationships & Associations

Depending on your requirements, and on your behalf, David can place insurance with any of the insurance providers listed (right). Neither David nor Advanced Insurance is contractually obliged to place business with any particular provider.

Fees & Remuneration

Neither David, nor Advanced Insurance will charge you a fee for implementing your insurance. Should you purchase insurance products through David, Advanced Insurance will receive commission from your insurance providers and, from time to time, may also receive bonuses and vouchers.

Managing Your Premium Payments

You can pay your premiums, e.g., weekly to ND Trustees Ltd. Subject to you providing sufficient funds, your premiums will be paid, as required by your policies, e.g., monthly, to your insurance provider. Advanced Insurance does not charge a fee for this facility.

Insurance Providers

AIA
Asteron
Aon Stylecover
CIGNA

Dorchester Life
Pinnacle Life
Southern Cross
Tower

Criminal Convictions

Over the previous five years, David has not had any criminal convictions, been subject to disciplinary proceedings, adverse findings by a court or commission, insolvency proceedings or bankruptcy.

Complaints & Dispute Resolution

Please raise any issues with Advanced Insurance first. If you feel that a problem remains unresolved, you can make a complaint to Financial Services Complaints Limited on 0800 347257 or www.fscl.org.nz

Indemnity Insurance

Advanced Insurance carries professional indemnity insurance for David's activities as an insurance broker.

Contact Details

First Name

Last Name

Street

Suburb

City

Postal Code

Country

Phone

Mobile

Email

I acknowledge that David has explained the contents of this personal disclosure statement and that I have read and understand it.

Signature

Date

Insurance Products

- Life
- Trauma
- Income
- Medical
- Business
- Personal

I would like David to advise me on the selected insurance products (above).

Signature

Date