

## Adviser Profile

### Lynda Ann Taylor

#### Licence Information:

FSP number: 9762

Mobile: 021 667 934

Landline: 09 213 3422



Lynda Taylor, your financial adviser is a salaried employee of Taylor Made Advice Limited. Lynda is a director of Taylor Made Advice Limited which has a transitional license to operate as a Financial Advice Provider – FAP 704851.

#### Contact details:

##### Physical:

C/- MFAS offices  
Level 3,  
149 – 155 Parnell Road  
Parnell,  
Auckland 1052

##### Postal:

PO Box 31 703, Milford, North Shore 0741

##### Website:

[www.taylormadeinsurance.net.nz](http://www.taylormadeinsurance.net.nz)

E [lynda@taylormadeinsurance.net.nz](mailto:lynda@taylormadeinsurance.net.nz)

##### Phone:

D 09 213 3422

M 021 667 934

#### Qualifications:

- Bachelor of Business Studies
- Diploma in Financial Planning
- Licensed Financial Adviser

#### Experience:

- I have been working in the financial services industry since 2006. I have been an adviser and director of Taylor Made Advice Limited since 2009, specialising in personal and business risk. For the past 10 years I have assisted clients with their KiwiSaver funds.

#### Professional Membership:

I am a member of Financial Advice New Zealand Ltd (FANZ).

## Financial Advice Services and Products

### Our Services:

- Financial Advice
- Risk Planning – Personal and Business risk
- Investment advice – KiwiSaver only

### Products I can advise on:

- KiwiSaver
- Life Insurance
- Accidental death cover
- Income Protection
- Mortgage Protection
- Trauma Insurance
- Health Insurance

### KiwiSaver providers that I may recommend:

- NZ Funds KiwiSaver
- Generate KiwiSaver
- Booster KiwiSaver

### Insurance providers that I may recommend:

- Accuro Health
- AIA Services New Zealand Limited
- Asteron Life Limited
- Fidelity Life
- NIB NZ Limited
- Cigna Life Insurance New Zealand Limited
- Partners Life Limited

I do not have any contractual agreements with any one provider. I do however have preferential providers based on the benefits offered in their policies, performance at claim time, and overall service provided.

## Duties

Taylor Made Advice Limited is bound by the duties of the Financial Markets Conduct Act to:

- Give priority to the client's interests
- Exercise care, diligence and skill
- Meet the legal standards of competence, knowledge and skill set out in the Code
- Meet the standards of ethical behaviour, conduct and client care set out in the Code.

This is only a summary of the duties that we have. More information is available by contacting us, or by visiting the Financial Markets Authority website at [www.fma.govt.nz](http://www.fma.govt.nz).