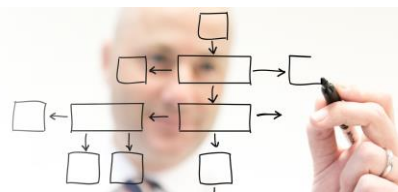


Secondary Disclosure Document



CHOOSING
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(Authorised Financial Advisor)

Name: Peter Stuart Ogilvie

Registration No: FSP 85541

Company Name: Ogilvie Financial Solutions Ltd

Trading Name: Plus4 Insurance Solutions Ltd

Address: 181 Bridge Street, Nelson

Office Number: 03 548 7979

Mobile Number: 0274 477 275

Email Address: peter.ogilvie@plus4.co.nz

Facebook: Ogilvie Financial Solutions Ltd

This disclosure statement was prepared on: 27th July 2018

Version Number: Version 2

Services and Products, I have provided

I have provided financial adviser services in the following subject matters:

+ Insurance Advice

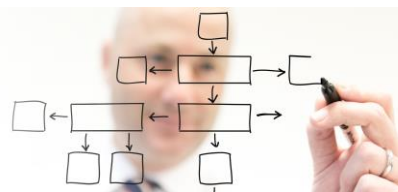
Insurance Products

- + Life Cover
- + Trauma Cover
- + Mortgage Repayment Cover
- + Waiver of Premium

Ogilvie Financial Solutions Ltd

P: 03-548-7979/ 0274-477-275 E: peter.ogilvie@plus4.co.nz A: 181 Bridge Street, Nelson www.plus4.co.nz

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Product Providers

In order to place business with a provider, we need to have a contractual agreement with that provider. We have contractual agreements for the sale of products issued by these providers:

- + Partners Life Limited
- + American International Assurance Company (Bermuda) Limited (AIA New Zealand)
- + AMP Life Limited, AXA New Zealand
- + Asteron Life Limited
- + Fidelity Life Assurance Company Limited
- + OnePath Life (NZ) Limited,
- + Sovereign Assurance Limited
- + Southern Cross Health
- + nib (NZ) Ltd
- + Generate KiwiSaver

My contractual relationships with these companies do NOT require me to place an agreed percentage of the business I do with any of them. Further, I do not have any agreements that require me to place any particular level of business with any company.

Fees

We don't charge fees for our Financial Advice Services.

Remuneration

I am the owner and managing director of Ogilvie Financial Solutions Ltd. I am a salaried employee of the company which trades under the name of Plus4 Insurance Solutions Ltd. My company receives all commissions that are generated by me. Any remuneration my company receives is in line with the adviser agreement it holds with the particular company.

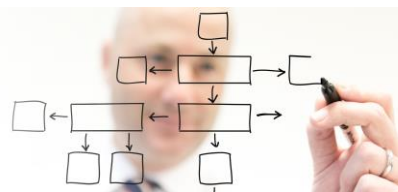
I provide a free initial consultation.

My company receives commissions for the placement of client's business with companies. This commission is usually in the form of an initial commission determined by the premium being paid, a bonus commission depending on the total volume of business done with that supplier in the course of a financial year, and renewal commission payable annually for every year the policy is in force. The rates of commission vary from company to company and product to product.

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Non-monetary benefits (soft dollar disclosure)

From time to time, Ogilvie Financial Solutions Ltd may receive certain non-monetary benefits from product providers. This could include gratuities such as a bottle of wine at Christmas time, a free calendar, pen or book, the occasional luncheon, drinks after a briefing session, invitations to sporting events, subsidised professional development, discounted training courses or office supplies, etc.

Other interests and relationships

Ogilvie Financial Solutions Ltd does not have any contractual requirements, quotas or agreements obliging me to recommend certain product providers' products or services.

Ogilvie Financial Solutions Ltd is a shareholder of Plus4 Insurance Solutions and as a result I may be eligible for bonus payments from certain insurance product providers. Under this arrangement Ogilvie Financial Solutions Ltd is under no obligation to meet any product quotas or to recommend a particular product provider. These bonus payments are outlined on page 5. I am also a director of this company.

Commission's payable in relation to my advice and recommendations;

Client Name: Troy &
Date of Advice: 15 Feb 2018
Company Recommended: Partner's Life

Product	Product Provider	Commission on first year's Premium	Ongoing Commission
Risk Products	Partners Life Personal	100%	10%
KiwiSaver	Generate	an upfront and ongoing commission is payable for KiwiSaver business.	

Declaration

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

Signed:

Ogilvie Financial Solutions Ltd

P: 03-548-7979/ 0274-477-275 E: peter.ogilvie@plus4.co.nz A: 181 Bridge Street, Nelson www.plus4.co.nz