Disclosure Statement

Version Date | 01 March 2026

Disclosure Statement | Bryce Wilson

This Disclosure Statement is given by Long Burroughs Financial Services Limited, as your financial advice provider; and our Financial Adviser who is employed or contracted by Long Burroughs Financial Services Limited.

If you ask us to provide you with financial advice, or we already are, we will do so on the terms set out in this Disclosure Statement.

By requesting our services, you accept these terms. If there is any change to these terms, we will confirm them to you in writing. This Disclosure Statement records the basis of our relationship.

Who is your financial adviser?

Your Financial Adviser is authorised under the Long Burroughs Financial Services Limited licence (FSP1006544) to provide financial advice services.

Your Financial Adviser details are as follows:

Financial Adviser	Bryce Wilson
FSP Register No.	FSP120682
Telephone	+64 21 211 4957
Email	bryce@longburroughs.co.nz

Long Burroughs Financial Services Limited holds financial advice provider licence issued by the Financial Markets Authority under the Financial Markets Conduct Act.

FSP Register No.	FSP1006544
Address	PO Box 37356, Parnell, Auckland 1052
Telephone	+64 9 374 5980
Email	hello@longburroughs.co.nz.

Your Financial Adviser has met the required standards of competency, knowledge, and skill of the Code of Professional Conduct for Financial Advice Services. Bryce Wilson has been in the industry for over 20 years, has completed the NZ Certificate in Financial Services Level 5, and also holds a BA Degree, and a Graduate Degree in Marketing.

Further information on the Financial Service providers registry which can be viewed on the New Zealand Companies Officer, , here.

How will we look after your insurance needs?
Our Financial Advisers work for you.
As a Financial Adviser, it is our duty to abide by the Code of Conduct for Financial Service Providers.

Long Burroughs Financial Services Limited is paid by the providers for the services our Financial Advisers provide, however, it is you that we work for.

To ensure your interests are put ahead of ours, our Advisers follow a 6-step advice process when providing personalised financial advice which is based on your individual goals and needs. Recommendations made to you are provided in writing so that you have the opportunity to ask any questions you might have before implementing our advice.

Long Burroughs Financials Services Limited, and anyone who gives financial advice on our behalf, has duties under the Financial Markets Conduct Act 2013 relating to the way that we give advice.

Our Services

Our Financial Advisers provide personalised advice that takes into account your individual circumstances to determine the personal risk products that best meet your personal goals and needs.

Our recommendations are limited to the products offered by the following companies:

AIA, Asteron, Chubb, Fidelity, NIB, Partners Life, Southern Cross

What fees and commissions are payable for services?

To ensure that advice remains accessible, Long Burroughs Financials Services Limited does not charge an upfront fee for providing personal risk insurance advice or for implementing advice if you decide to proceed.

In place of an upfront fee, Long Burroughs Financial Services Limited is paid a commission for any new insurance taken up, of between 30% and 240% of the first year's premium, depending on which insurance company you take out cover with.

From year two, Long Burroughs Financial Services Limited may then receive an annual commission of between 8% and 10% of the premium for the time Long Burroughs Financial Services Limited remains the servicing adviser on the policy.

Our Financial Advisers will confirm the amount of commission Long Burroughs Financial Services Limited will receive a recommendation is provided to you.

Who do I contact with any complaints and/or disputes?

If you are not fully satisfied with our services or wish to make a complaint, please speak to your Financial Adviser in the first instance. If your complaint is not resolved to your satisfaction or you do not want to speak with your Financial Adviser, you may contact Long Burroughs Financial Services Limited directly as follows:

Complaints Officer
Long Burroughs
PO Box 37356,
Parnell, Auckland 1052
Phone: + 64 9 374 5980
Link to our website

We will endeavour to resolve your problem openly and fairly and within a timely manner.

If you are unable to resolve your complaint with Long Burroughs Limited, you may refer it to Financial Services Complaints Limited (FSCL), of which Long Burroughs Financial Services Limited is a member. FSCL is an approved independent dispute resolution scheme which handles complaints against financial service providers, including insurance brokers.

FSCL is free to consumers and its decisions are binding on IANZ and Long Burroughs Limited (but not on you). Further information about FSCL is available from IANZ and/or from www.fscl.org.nz . You may contact FSCL directly on 0800 347 257

In some circumstances a dispute may arise between you and an insurer. In such circumstances your financial Adviser and Long Burroughs Financial Services Limited will assist you with details of the Insurer's Internal Dispute Resolution process and, if the dispute remains unresolved, access to the Insurer disputes resolution scheme. If the dispute proceeds, you should obtain legal advice from a qualified lawyer.