



The Insurance Ladies
Protecting what's important to you

My Client Promise

My Client

My business is built on helping all New Zealanders to protect what's important to them. Without my clients I do not have a business. My clients come first and foremost in all I do.

My Client Experience

After meeting with myself, my clients leave better informed about their risks, quantification of their risks and their options. I understand what's important to them and provide suitable recommendations and options to help them make informed decisions.

Trusted Adviser

As a Financial Adviser in my business, I have become a trusted adviser to my clients and have earned the Financial Advice New Zealand Trusted Adviser badge. I work together to prepare for and defend against life's challenges, and I am there to support, help and provide advice along the way.

What to expect from me as Your Financial Adviser

I am required to follow my internal policies and procedures, adhere to my Code of Conduct, and provide clients with a professional service.

Our Client Care, Diligence and Skill

When you work with me, you can be confident that I am qualified to provide advice to you and that I complete ongoing professional development to stay current with any changes. I will try to keep my advice free of jargon.

If things Go Wrong

There may be times when clients are unhappy. I will listen to your concerns and work with you to resolve the situation in a timely manner. If I cannot agree, then I will refer you to my Disputes Resolution Scheme who will work through the issue impartially.

My Commitment

I have checks and balances in place to support good conduct in my business, address any poor conduct, and keep my clients as the key focus of my business.

My Processes

I am supported by tools, policies, procedures, and controls to ensure that not only do I meet my regulatory obligations (and conduct regular compliance checks to make sure this happens) but I deliver the service I promise you.

My Values

In my business, my values drive my approach to business. It's about staying true to the needs of my clients and their interests.

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