

# Adviser Profile

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Name: Hamish Neil McPhail

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Registration: FSP 50841

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Phone: 021 632 226

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Email: hamish@mfas.co.nz

## Your Financial Adviser

Hamish McPhail, your Financial Adviser, is a salaried employee of Medical Financial Advisory Services Ltd. Medical Financial Advisory Services Ltd is the Financial Advice Provider License holder, 43124.

## Qualifications

I have a Graduate Diploma in Business Studies; endorsed with Personal Financial Planning (1997), Certified Financial Planner<sup>CM</sup> (2004), and Bachelor of Laws (1979).

## Experience

I have operated as a financial adviser since 1992. I had previously worked as a solicitor specialising in Estates, Trusts, and Wills. In October 2001, I established Medical Financial Advisory Services Ltd (MFAS) and own 60% through my associated interests. I specialise in Financial Planning and investment advice.

## Professional Memberships

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

## Financial Services and Products

Services I can advise on:

- > Financial Planning for building wealth, retirement, and spending wealth.
- > Investment advice on solutions to ensure you meet your objectives.

Products I can advise on:

- > KiwiSaver
- > Managed investments
- > Superannuation and pensions
- > Direct investments such as shares, UK Listed Investment Trusts

As I have an in depth understanding of the NZ Funds Investment Portfolios, I recommend NZ Fund's Investment Portfolios in most cases where I see an alignment to client needs. I do not have any quota agreements with any product provider.

## Duties Information

I am bound by the duties of the Financial Markets Conduct Act to:

1. Give priority to the clients' interest.
2. Exercise care, diligence, and skill.
3. Meet the standards of competence, knowledge and skill set in the Code of Conduct.
4. Meet the standards of ethical behaviour, conduct, and client care set out in the Code of Conduct.

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