

Adviser Profile



Name: Lynda Ann Taylor

Registration: FSP 9762

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Your Financial Adviser

Lynda Taylor, your Financial Adviser contracts to Medical Financial Advisory Services Ltd (MFAS). 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 (2001), and a Bachelor of Business Studies.

Experience

I have operated as a financial adviser since 2009, specialising in personal and business risk.

Professional Memberships

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

Financial Services and Products

Services I can advise on:

- > Cash and Debt management
- > Personal and business insurances
- > Investment advice – KiwiSaver only

Products I can advise on:

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

Products I can recommend:

- > NZ Funds Management Ltd
- > Accuro Health
- > AIA Life
- > Asteron Life
- > Partners Life
- > Fidelity Life

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 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.