

Adviser Profile



Name: Susan (Sue) Jane Stewart

Registration: FSP 42702

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Your Financial Adviser

I am a co-owner (through associated interests) of Medical Financial Advisory Services Limited (MFAS) with my business partner Hamish McPhail (through associated interests).

Medical Financial Advisory Services Ltd is the Financial Advice Provider License holder, 43124.

I am a salaried employee of Medical Financial Advisory Services Ltd.

Qualifications

I have a Graduate Diploma in Business Studies, endorsed with Personal Financial Planning (2001) and am a Certified Financial Planner^{CM} (2004).

I specialise in Financial Planning and investment advice.

Experience

I have operated as a financial adviser since 2001 with MFAS.

I specialise in Financial Planning and investment advice.

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 bonds, 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.

Professional Memberships

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