

# Complaints Form

YOUR NAME:	
INVESTMENT NUMBER:	
ADDRESS:	
PHONE:	
MOBILE PHONE:	
EMAIL:	
FAX:	

PREFERRED METHOD OF CONTACT:  
\* PLEASE TICK

Mail	<input type="checkbox"/>
Email	<input type="checkbox"/>
Phone	<input type="checkbox"/>
Mobile Phone	<input type="checkbox"/>
Fax	<input type="checkbox"/>

WHAT IS YOUR COMPLAINT?


Please continue on the back page

WHAT WOULD YOU LIKE TO HAPPEN TO RESOLVE THIS ISSUE?

NOTIFYING YOUR FINANCIAL ADVISER

If you have a client - relationship with a financial adviser, our approach is to notify them of your complaint and if appropriate, allow them the option to resolve this directly with you. We will continue to remain involved in this process at all times.

If you do not wish us to inform your financial adviser, please tick the box here

☐

SIGN HERE

PRINT YOUR NAME

DATE

PLEASE SEND TO:  
EMAIL

pukekohe@generationwealth.co.nz

POST

The Complaints Officer  
Generation Wealth Management  
PO BOX 66, Pukekohe 2340