

IT HAPPENS®

INSURANCE & INVESTMENT ADVISERS

In Touch



Sheryl Glasse

This is my first email newsletter so I hope you enjoy it.

I understand we all receive so many emails and do not wish to offend so please let me know if you prefer not to receive it by clicking the unsubscribe button at the bottom of the newsletter.

On the other hand if you do enjoy it please feel free to pass it on to your family and friends.

Update on Financial Advisers Act 2008

This is now being enforced by the securities commission and new laws come into force from 1 July 2011.

I am currently studying the National Certificate in Financial Services Level 5 to become an Authorised Financial Adviser to meet the new requirements of the act.

It changes the depth of information required from clients and amount of information we need to provide to clients before they can make an investment or insurance decision.

The Certificate takes approximately 8 full weeks spread over many months and requires time out of the office.

I am approximately $\frac{3}{4}$ of the way through and look forward to achieving my certification.

Time Out

I hope you are enjoying the better weather now it appears to be here.

I went to Orere Point for Labour Weekend and although I had not fished for 20 years I managed to win the first prize after the snapper with a 1.82kg Kawhai.

I hope this finds you well and life is good – as always I am only a phone call or email away if you wish to have a chat.

Sheryl



Quite a Catch