

Disclosure Statement



Damian Sligo-Green - Financial Adviser

I'm Damian.

I work with people who want to build their financial future through smart investment choices and strategic planning. Whether you're looking to optimise your KiwiSaver, prepare for a first home purchase, plan for retirement, or build wealth through managed investments, I want to help you make informed decisions that align with your goals and values.

How I work.

I focus on education and enablement - helping you articulate your goals, identify barriers and understand your options so you can make informed decisions. I lean heavily on cloud technologies that save time, effort and paper and help everyone to build understanding and alignment. I specialise in KiwiSaver optimisation, investments and retirement planning strategies. I'll give you clear guidance in language you'll understand, based on your specific situation and goals.

My advice is reliable, research-based, and focused on long-term wealth creation. As a Financial Adviser, I stay current with the latest investment products and market developments, so I can show you the best possible path toward your financial goals.

This disclosure statement was prepared on: 24 February 2026

Your Adviser

Financial Adviser:	Damian Sligo-Green (FSP1011603)
Contact Details:	damian@freehold.nz + 64 27 510 2520
Address:	Unit 1, 60 Cuba Street, Te Aro, Wellington 6011

1. Licence Status & Conditions

Booster Financial Services Limited ('Booster') (FSP28287) is a Licensed Financial Advice Provider issued by the FMA to provide financial advice services.

Financial Advisers are engaged by Booster to provide financial advice. Booster is responsible for the financial adviser services and disclosure obligations of these Nominated Representatives.

Damian Sligo-Green (FSP1011603), trading through Freehold KiwiSaver Limited ('Freehold') is your financial adviser and he is providing financial advice on behalf of Booster Financial Services Limited who is the Financial Advice Provider License holder.

2. My Scope of Advice

I provide financial advice in the following areas:

- Investment planning and portfolio management
- KiwiSaver advice and fund selection
- Retirement planning strategies
- Risk profiling and asset allocation
- Financial goal setting and planning
- Budgeting and cash flow analysis

3. Product providers I work with

I am able to advise on products issued by Booster Investment Management Limited, a subsidiary of Booster:

- Booster KiwiSaver Scheme
- Booster Investment Products

4. My Commitment is to:

When giving you financial advice, I am bound to:

- give priority to your interests by taking all reasonable steps to make sure our advice isn't materially influenced by my own interests, or the interest of any other party associated with giving you advice; and
- exercise care, diligence, and skill in providing you with advice; and
- meet the standards of competence, knowledge, and skill set out in the Code of Professional Conduct for Financial Advice Services; and

- meet the standards of ethical behaviour, conduct, and client care set out in the Code of Professional Conduct for Financial Advice Services.
- Ensure you understand the scope of advice given

This information above is also available on Booster's website at [Financial Advice Provider licence \(booster.co.nz\)](https://www.booster.co.nz/financial-advice-provider-licence)

5. Cost of Advice

Below is an overview of how I charge for my services.

My fees may be structured as a fixed dollar amount, an hourly rate, or a percentage-based fee. In some cases, we receive a commission instead of a fee. Depending on the specific work I do for you, I may charge a combination of both."

Fees

Fees payable directly by the client to Freehold upon invoice for planning or consultation work may be applicable. Fees are charged for expertise and opinion, not for product placement or "brokering", unless requested by a client and agreed to by Freehold KiwiSaver Limited.

An estimate of fees for any particular engagement will always be provided in advance. If necessary we can agree in advance to a fixed price for an engagement. If fees are to be paid, then:

- **The hourly rate charged is \$200 (+GST)**
- **Terms of payment** are payment on the 20th of the following month, with direct credit to the bank account of Freehold KiwiSaver Limited
- **Cash or barter are not accepted** as means of payment

Commissions

Booster Investment Management Limited, the Manager and Issuer of the Booster KiwiSaver Scheme and the Booster SuperScheme, earns fees as the Manager of those products.

Booster Nominated Representatives and Financial Advisers that are not employed by Booster

As I am not employed by Booster, I or my employer is entitled to all applicable fees arising from the sale of the financial products named in this Disclosure Statement. This includes the following fees:

- **Booster KiwiSaver Scheme:**
 - A one off \$30 per new member paid at the 12-month anniversary of the member joining the Scheme.

- Adviser service trail of up to 0.5% p.a. of your total funds invested in the relevant financial product calculated daily and paid monthly by Booster Investment Management Limited.
- **Booster Investment Products:** Adviser service trail of up to 1.05% p.a. of your total funds invested paid by Booster Investment Management Limited.

I have referral relationships with other financial advice providers who provide specialist advice on Risk & Health Insurance, lending and Discretionary Investment Management Services (DIMS). These providers may pay me a fee for clients I refer. These providers will be disclosed if and when relevant.

6. Conflicts of Interest

I receive commissions from Booster (the KiwiSaver providers and managed fund platforms).

If you decide to implement my KiwiSaver or investment advice, Booster will pay a commission to me as your financial adviser. The amount of commission is set out in the commissions section above and, apart from the one off marketing fee, is calculated based on the value of your investment or the ongoing fund balance.

From time to time, Booster may provide access to educational conferences, research materials, training seminars, or other professional development opportunities. These are typically industry-standard educational benefits rather than personal incentives.

Booster has an internal policy for managing any potential conflicts of interest that could occur and is reviewed and adjusted on an annual basis. Along with the internal policy a quarterly report is completed on all Booster Nominated Representatives and Financial Advisers and will include any Conflicts of Interest. If any arise, the Scope of Advice will be updated to reflect this.

7. Reliability History

Reliability history you should be aware of: None.

A reliability event is something that may materially influence your decision to seek advice. An example of this would include any legal proceedings against a Financial Adviser or Booster as a company.

There has been no reliability event, nor have I or Booster been publicly disciplined as defined under Part 1 Section 3 and Section 4 of Financial Markets Conduct (Regulated Financial Advice Disclosure) Amendment Regulations 2020 (as amended from time to time).

8. Complaints

What should you do if you are unhappy with something?

If you have a problem, concern, or complaint about any part of my service, please contact me directly so that I can try to fix the problem.

You can also contact Booster by calling the Complaints Officer on:

Telephone:	0800 336 338
Email:	clientservices@booster.co.nz

Complaints are recorded on a complaint's register. Booster endeavours to resolve complaints within 14 days. If a complaint remains unresolved after a 60-day period, the complainant has the option of referring the complaint to the external dispute resolution scheme of which Booster is a member of. If your complaint cannot be satisfactorily resolved this way, it then becomes a dispute.

Our Dispute Resolution process is:

1. **In the event of a dispute** you must notify me that the complaint is not resolved and is now a dispute.
2. **Written confirmation:** I will confirm in writing our internal complaints process, likely timeframes, and our Disputes Resolution Scheme which you can access at any stage should you choose to.
3. **Booster complaints processes:** Should I fail to handle the problem to your satisfaction within a reasonable time frame then Booster themselves have internal complaints handling processes which you might wish to also access.

External Dispute Resolution scheme

Booster is a member of Financial Services Complaints Limited (FSCL), which is an approved dispute resolution scheme for the purposes of the Financial Service Providers (Registration and Dispute Resolution) Act 2008. Financial Services Complaints Limited won't charge you a fee to investigate or resolve your complaint.

The contact details of the Financial Services Complaints Limited are as follows:

Physical Address:	Level 4, 101 Lambton Quay, Wellington 6011
Mailing Address:	FSCL, PO Box 5967, Wellington 6140
Email:	complaints@fscl.org.nz
Website:	www.fscl.org.nz
Telephone:	0800 347 257

You can also visit the Booster website for information on the complaints process at www.booster.co.nz/contact-us/how-to-complain