

Client Service Information

We are committed to providing outstanding advice and service to our clients. This document sets out what you can expect when you deal with us, who we are and the New Zealand Law Society's client care and service information.

Client care and service

We will always:

- act competently, in a timely way, and in accordance with instructions received and arrangements made;
- protect and promote your interests and act for you free from compromising influences or loyalties;
- discuss with you your objectives and how they should best be achieved;
- provide you with information about the work to be done, who will do it and the way the services will be provided;
- charge you a fee that is fair and reasonable and let you know how and when you will be billed;
- give you clear information and advice;
- protect your privacy and ensure appropriate confidentiality;
- treat you fairly, respectfully and without discrimination;
- keep you informed about the work being done and advise you when it is completed; and
- let you know how to make a complaint and deal with any complaint promptly and fairly.

The obligations lawyers owe to our clients are described in the *Rules of Conduct and Client Care for Lawyers*. Those obligations are subject to other overriding duties, including duties to the courts and to the justice system.

If you have any questions, please visit www.lawsociety.org.nz or call 0800 261 801.

Responsibility for services

The names and status of the person or persons who will have overall responsibility for your work are set out in our Letter of Engagement.

Fees

The basis on which fees will be charged and payment is to be made is set out in our Terms of Engagement. We may deduct from any funds held on your behalf in our trust account any fees, expenses or disbursements for which we have provided an invoice.

Professional Indemnity Insurance

We hold professional indemnity insurance that meets or exceeds the minimum standards specified by the Law Society. We will provide you with particulars of the minimum standards upon request.

Lawyers' Fidelity Fund

The Law Society maintains the Lawyers' Fidelity Fund for the purposes of providing clients of lawyers with protection against pecuniary loss arising from theft by lawyers. The maximum amount payable by the Fidelity Fund is limited to \$100,000. The fidelity fund will not usually cover loss relating to money a lawyer is instructed to invest on behalf of a client.

Complaints

We have a complaints procedure which is designed to ensure that a complaint is dealt with promptly and fairly.

If you have a complaint about our services or charges, you may refer your complaint to the person in our firm who has overall responsibility for your work.

If you do not wish to refer your complaint to that person, or you are not satisfied with that person's response to your complaint, you may refer your complaint to our senior director, Tony Ivanson. Tony may be contacted by email to tony.ivanson@gellertivanson.co.nz or by telephone on +64 9 575 2330.

You can also contact the Law Society's Complaints Service by calling 0800 261 801.