

GELLERT IVANSON LIMITED CLIENT CARE CHARTER

Client Care and Service

Gellert Ivanson Limited 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. Advise you of a conflict of interest and resolve that with you.
- 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.
- Let you know how to make a complaint and deal with any complaint promptly and fairly.

The obligations we 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.

Services that we can provide

Gellert Ivanson Limited provides a wide range of legal services but predominantly, property law (private and commercial), leases, subdivision, resource management, company, commercial, copyright, trademarks, employment, contract, wills, estates, family trusts, estate and asset protection planning and we provide a professional trustee service and computerised trust administration system. We also provide litigation support, but do not handle involved litigation, choosing to brief appropriate barristers recognised as experts in the particular field covering the client's need.

Initial and ultimate responsibility for any work undertaken by the firm vests with Pearl Butler, Tony Ivanson and Daniel Smith. We encourage clients to deal with the directors in the first instance.

Responsibility for services

We will allocate your instructions to staff with the expertise and experience required to professionally handle your instructions while maximising the cost effectiveness of the work

undertaken. All work performed by staff who are not directors is subject to director supervision.

We have a highly experienced and dedicated team assisting Pearl, Tony and Daniel.

The names and position of the people in our firm who may carry out the services for you are:

Pearl Janet Butler LLB: Director.

Anthony Moore Andrew Ivanson LLB/Notary Public: Director.

Daniel Alexander Smith BCom/LLB (Hons): Director.

Denise Cheese: Registered Legal Executive/Assistant to Pearl (Conveyancing/Family Law).

Sue McColl: PA/Legal Assistant to Tony (Conveyancing/Company Law).

Suzanne Dean: Legal Assistant to both Pearl and Tony (Conveyancing/Leases/Estates).

Irene Coleman: PA/ Legal Executive to Pearl (Conveyancing).

Melissa Fieldhouse: Secretary to Pearl.

Sarah Muirhead)

Glenys Bycroft) Trust Service Executives

Phyllis Weaver)

Shaynne Hayward: Receptionist and PA to Daniel Smith

Fees

Our fees for professional services are calculated on the basis of a number of factors resulting in what we consider is a fair and reasonable fee for the time expended and value of the service. Our current hourly rates are as follows:

Pearl Butler	NZ\$350.00	per hour
Tony Ivanson	NZ\$350.00	per hour
Daniel Smith	NZ\$300.00	per hour
Legal Executives	NZ\$150.00	per hour

Cost Estimates

It can be difficult to give an estimate of the likely costs that will be incurred in the conduct of any matter due to the various contingencies that can occur and which are outside of our control.

Billing arrangements

For short term matters we will normally bill you on completion, but we issue interim accounts, usually monthly, while work is in progress, with a final bill on completion. Current payment terms are set out on invoices from time to time, and unless otherwise stated are due for payment within 14 days. We may deduct from funds held on your behalf any fees, disbursements or expenses 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. Our insurers are Justitia Mutual Association Inc, underwritten by American Home Assurance Company. 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 by way of compensation to an individual claimant is limited to \$100,000.

Except in certain circumstances specified in the Lawyers and Conveyancers Act 2006 the Fidelity Fund does not cover a client for any loss relating to money that a lawyer is instructed to invest on behalf of the client.

Complaints

We maintain a procedure for handling any complaints by clients, 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 Tony Ivanson, Director and Professional Standards Officer.

He may be contacted as follows:

- by letter;
- by email at tony.ivanson@gellertivanson.co.nz;
- by telephoning him at +64 9 575 2330.

You can also contact the NZ Law Society's Lawyers' Complaints Service, at 26 Waring Taylor Street, PO Box 5041, Wellington 6145, Tel (04) 472 7837 or (0800) 261 801, Fax (04) 473 7909.