

Client Care Information

(See Terms of Engagement for full details)

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| Person at Bird & Yang with the day- to-day responsibility for this matter: | Marshall Bird Aimee Yang Kieran Blockley William Heaps Rockie Wei Ming Lu | | | | | | | | | | | | |
| Director at Bird & Yang who is responsible for overseeing this matter: | Marshall Bird Aimee Yang | | | | | | | | | | | | |
| Summary of work required by you: | Please see letter of engagement for details. | | | | | | | | | | | | |
| Work timetable: | Please see letter of engagement for details. | | | | | | | | | | | | |
| Basis of charging (amounts are plus GST, if applicable): | <p>We will charge on the basis of time spent on your matter, and the following rates per hour will apply (note other people with other charge-out rates may work on your file from time to time):</p> <table> <tr> <td>Director (Marshall Bird)</td><td>\$600.00</td></tr> <tr> <td>Director (Aimee Yang)</td><td>\$375.00</td></tr> <tr> <td>Solicitor</td><td>\$280.00</td></tr> <tr> <td>Legal executive</td><td>\$225.00</td></tr> <tr> <td>Law Clerk</td><td>\$225.00</td></tr> <tr> <td>Administrator</td><td>\$175.00</td></tr> </table> <p>Please note that these charges are reviewed from time to time and may change.</p> | Director (Marshall Bird) | \$600.00 | Director (Aimee Yang) | \$375.00 | Solicitor | \$280.00 | Legal executive | \$225.00 | Law Clerk | \$225.00 | Administrator | \$175.00 |
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| Solicitor | \$280.00 | | | | | | | | | | | | |
| Legal executive | \$225.00 | | | | | | | | | | | | |
| Law Clerk | \$225.00 | | | | | | | | | | | | |
| Administrator | \$175.00 | | | | | | | | | | | | |
| Experts and third-party professionals | Unless we agree otherwise in writing, you are required to engage any expert or third-party professional directly and we are not responsible for the payment of any invoices rendered by the expert or third-party professional in relation to your matter | | | | | | | | | | | | |
| Our client | Unless we agree otherwise in writing, your acceptance of our terms of engagement binds you in your personal capacity and binds any entity on whose behalf you represent and provide us with instructions for, including a trust or company | | | | | | | | | | | | |
| Estimate | If you require an estimate of our fees for certain stages of your proceedings, then we would be happy to provide you with one. | | | | | | | | | | | | |
| Insurance | We hold professional indemnity insurance which meets the Law Society standards. | | | | | | | | | | | | |
| Lawyers' fidelity fund coverage | The Law Society maintains the Lawyers' Fidelity Fund for the purpose of providing clients of lawyers with protection against loss arising from theft by lawyers. The maximum amount 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. | | | | | | | | | | | | |
| Limitation of liability | <u>We limit our liability to the total amount of our fees (excluding GST) rendered to you for services to you on the applicable matter.</u> Full details are in our terms of engagement. | | | | | | | | | | | | |

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| Keeping your records | <p>We will retain or dispose of your records in accordance with our terms of engagement. We will provide copies to you in accordance with our obligations under the Privacy Act 1993 on request. We may charge for the cost of providing records to you.</p> <p>We are obliged to comply with all laws applicable to us in all jurisdictions, including (but not limited to):</p> <ul style="list-style-type: none"> ▪ Anti-money laundering and countering financing of terrorism laws; and ▪ Laws relating to tax and client reporting and withholdings. <p>We may be required to undertake customer due diligence on you, persons acting on your behalf and other relevant persons such as beneficial owners and controlling persons. We may not be able to begin acting, or to continue acting, for you until that is completed.</p> |
| Law Society's client care and service information | <p>The Law Society's client care and service information is set out below.</p> <p>Whatever legal services your lawyer is providing, he or she must:</p> <ul style="list-style-type: none"> • 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 in which 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. <p>The obligations lawyers owe to 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.</p> <p>If you have any questions, please visit www.lawsociety.org.nz or call 0800 261 801.</p> |
| Lawyers complaints service | <p>If you have a complaint about the services, you have received from our firm please contact us at info@birdyang.co.nz.</p> <p>If we have been unable to resolve a complaint or concern you may contact:</p> <p>The Lawyers Complaints Service Phone: 0800 261 801</p> <p>Website: www.lawsociety.org.nz/for-the-community/lawyerscomplaints-service/concerns-form</p> <p>Email: complaints@lawsociety.org.nz</p> |