



Client Care Information

Our standard terms of engagement (“Terms”) which apply in respect of all work carried out by Foundation Legal can be viewed on our website.

Set out below is the information required by the Rules of Conduct and Client care for Lawyers of the New Zealand Law Society (“Law Society”).

Insurance	We hold professional indemnity insurance which meets or exceeds the minimum standards set by the Law Society.
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	We limit our liability to the maximum amount payable under our professional indemnity insurance. Full details are in our Terms.
Keeping your records	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.
Compliance obligations	<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	The Law Society’s client care and service information is set out below.

	<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 Claire Gibson;</p> <ul style="list-style-type: none"> • by letter • be email at claire@foundationlegal.co.nz • by telephoning 021 715 325 <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 Website: www.lawsociety.org.nz/for-the-community/lawyers-complaints-service/concerns-form Email: complaints@lawsociety.org.nz</p>