

Trustees Executors Service Charter

Our commitment to a
client-first service



We're your trusted partner and adviser, working for the benefit of your investors.

At Trustees Executors, we stand as a beacon of excellence in corporate financial services.

With our ethos of always doing the right thing, we are here to safeguard and protect the assets of New Zealanders who entrust them to our clients. We uphold our Service Charter both individually and collectively, knowing that it is the foundation of our business.

Our Commitment

1. We will always keep our clients and their investors at the forefront of everything we do.
2. We will provide a superior level of service to you, which is enabled by our great people.
3. We will be transparent and prompt in our communication with our clients.
4. We will take the time to get to know your business and priorities.
5. We will regularly ask for client feedback so that we can continuously improve our services.
6. We will be transparent and accountable, we will take ownership and always commit to what we say.

Trustees Staff Commitment

1. I commit to being a part of a diverse and talented team that is dedicated to putting you and your investors best interests at the forefront of everything we do.
2. I will endeavour to use good judgement and respect the trust placed in me to respond to the needs of our clients.
3. I take ownership of resolving and communicating client issues, even if they are not within my immediate responsibility.
4. I will contribute to creating an environment where team members can learn from each other, feel valued, and be empowered to provide excellent service.
5. I recognise my responsibility to improve my professional development and growth as an individual.
6. I understand the importance of respecting and protecting the confidential information of our clients and Trustees Executors.
7. I place my trust in and am accountable to our team.
8. I will uphold our Charter both individually and collectively.