

# CLIENT SERVICE CHARTER

This is our commitment to provide all our clients with quality service and clear service standards that we can be held accountable to. This Charter also provides our employees with clear standards to strive for in service excellence according to our values and to achieve our vision to be Australia's leading trustee company. Equity Trustees as a trustee, will always put its duty to beneficiaries, investors and members first and over its own interests.

## OUR PROMISE

(1)

We will always treat you respectfully and provide professional, prompt and friendly service

(2)

We will be clear and realistic about what we can do and in what timeframes and communicate that to you

(3)

We will respect your privacy and confidentiality in your dealings with us

(4)

We will provide you with accurate and consistent information

(5)

We want to understand the experience our clients have, and we will ask for your feedback from time to time so we can continue to improve our service



## CONTACT US

As we strive to deliver exceptional client service, we encourage you to provide feedback. Whether you have a request for action, a compliment or a complaint, we would like to hear from you.



### Call

Speak to our general reception on: 1300 133 472



### Email

General inquiries: [enquiry@eqt.com.au](mailto:enquiry@eqt.com.au)  
Your assigned client relationship manager



### Internet

Visit our website at [www.eqt.com.au](http://www.eqt.com.au)



### Mail

Write to us:  
Equity Trustees  
GPO Box 2307  
Melbourne  
VIC 3001

Follow Equity Trustees on LinkedIn 

For more than 145 years\*, Equity Trustees has been providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers.

Equity Trustees is the brand name of EQT Holdings Limited (ABN 22 607 797 615) and its subsidiary companies, publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane, Perth, Adelaide, London and Dublin.

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\*Equity Trustees was established in 1888. ANZ Trustees (acquired by Equity Trustees in 2014) was established in 1878. Australian Executor Trustees (acquired by Equity Trustees in 2022) was established in 1879.