

## Legal Services Policy

### General

DocsCentre Legal Pty Ltd ACN 143 106 987 (**DocsCentre Legal**) is an incorporated legal practice within the DocsCentre group.

DocsCentre Legal has a single client, being DocsCentre Pty Ltd ACN 096 781 976.

### Engagement

Only an Australian qualified legal practitioner is authorised to prepare legal documents. DocsCentre Legal supplies legal documents to DocsCentre to assist DocsCentre in providing Services you request, whether through the Website, the Platform or in another way. DocsCentre Legal does not provide legal documents or legal services to you.

DocsCentre Legal is engaged by DocsCentre to:

- prepare legal documentation for DocsCentre;
- take reasonable measures to ensure the legal documentation supplied to DocsCentre is contemporary, accurate, relevant and appropriate according to the general category of Service that is ordered; and
- ensure every legal document is prepared under the supervision of qualified lawyers and paralegals.

### Guidance

DocsCentre Legal:

- may provide general advice to you;
- is not engaged to provide legal services, or any other services, to you;
- is not responsible to you for the contents of any document forming part of a Service requested by you;
- provides legal services to DocsCentre solely for the purpose of DocsCentre providing a Service to you.

When used in this Policy, **general advice** means, without limitation, advice relating to:

1. why a particular Service may be used generally, without considering why it is specifically being considered or the desired outcome or legal effect of the documents forming part of the requested Service;
2. the general effect of laws applying to Services DocsCentre provides, without considering specific circumstances;
3. the standard provisions in documents forming part of a Service and any possible or general outcomes they may produce, but without considering specific circumstances; and
4. potential considerations for you to take into account when considering documents forming part of a Service.

## Services Requested

DocsCentre receives orders for Services from you.

If you are a professional adviser, DocsCentre takes instructions from you after you have taken instructions from your client, and you have made decisions about what is appropriate for their interests and specific requirements. In these cases, only you can make decisions about what is most appropriate for your client and their circumstances. You have the relationship, history and client background. You provide advice and direct your client about what is the most appropriate course of action for their specific needs and desired outcomes. DocsCentre has no engagement or interaction with your client.

If you are not a professional adviser, DocsCentre receives orders and takes instructions from you after you have made decisions about what is appropriate for your interests and specific requirements. Only you can make decisions about what is most appropriate for you and your circumstances. You have your own history and background. You should seek advice from a professional adviser who can direct you about what is the most appropriate course of action for your specific needs and desired outcomes.

## Agreement

When you have contact with DocsCentre, whether or not you have requested DocsCentre to provide Services, you agree to the terms of this Policy and that:

1. DocsCentre and DocsCentre Legal provide general advice only;
2. neither DocsCentre nor DocsCentre Legal can give legal advice to you or your clients;
3. where information is provided to you, whether or not it is provided in response to your questions or enquiries, that information is not legal advice;
4. if you or your client require legal advice, DocsCentre will, if requested to do so, refer you to an external law firm who can engage with you and/or your client in relation to the provision of that advice;
5. you have satisfied yourself that any Service you order satisfies your or your client's specific needs;
6. you have satisfied yourself that the contents of any documents forming part of a Service requested by you are appropriate to you or your client's specific needs and take effect in a way in which you intend;
7. you will read the documents forming part of a Service requested by you and advise us if you believe that they do not achieve your intended purpose before being used;
8. any contact you have with DocsCentre Legal is for the purpose of:
  - confirming or clarifying your instructions to DocsCentre in relation to Services you have requested from DocsCentre;
  - providing general advice in accordance with this Policy;
9. neither DocsCentre nor DocsCentre Legal have considered your or your client's needs or requirements in relation to Services requested by you. Your or your client's specific circumstances including your or their asset and liability position, taxation or financial position, desired outcomes, structural requirements or retirement outcomes or any desired effect of the structures or documents forming part of a Service have not been considered in relation to Services requested by you;

10. the legal, commercial and taxation effects of a document vary and a document's appropriateness and/or suitability to a specific transaction or structure will, therefore, vary according to your or your client's particular circumstances;
11. your or your client's intended purpose for a Service or the documents forming part of a Service requested by you and the intended outcome of using that Service or those documents is known only to you and/or your client. Neither DocsCentre nor DocsCentre Legal accept any responsibility for your choice of Service or document for a specific purpose.

### **Information**

While all reasonable efforts will be made by DocsCentre to ensure accuracy, we rely on you to provide accurate information in relation to Services requested by you. Where you have provided information, you agree and acknowledge that:

1. the documents forming part of a Service requested by you will be prepared in accordance with your instructions and the information you provide;
2. you accept sole responsibility for all information provided by you or incorporated or used in a document forming part of a Service requested by you from that information.

### **Terms and Conditions**

This Policy is subject to and forms part of our Terms and must be read together with our Terms. Words and expressions used in this Policy have the same meanings given in our Terms. If there is an inconsistency between this Policy and our Terms, our Terms prevail to the extent of any inconsistency.

You can find our Terms and Conditions [here](#).

We reserve the right to amend this Policy, from time to time, without notice to you or to any other person. Any amended Policy applies immediately upon being posted on our website.

Effective 20 October 2023

DocsCentre Pty Ltd ABN 14 096 781 976 is 100% owned by Sequoia Financial Group Ltd ASX:SEQ

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