

INFORMATION LEAFLET

CLIENT CARE PROCEDURE FOR OLDER AND VULNERABLE CLIENTS - 2018

- We realise that it is especially important to treat older clients, their families and representatives, with additional consideration, by being both sympathetic and sensitive to any issues they may have and ensuring that our firm and our all our staff treat older clients, their families and representatives with dignity, kindness and respect at all times
- Due to the nature of the advice that we may need to give, it is important that we can see our client alone initially. However, we appreciate that some clients may prefer a trusted friend or relative present, so we will try to accommodate this where we can. At some point throughout the process, we will need an opportunity to see our client alone, but we will do our utmost to make sure that the client feels at ease, and understands why this is necessary
- Where English is not the first language of our client, or has difficulty hearing or with sight, we suggest that an appropriate independent interpreter assists, or a person that our client trusts to assist the client understand what is being discussed.
- A record is kept of persons present at the meeting and is confirmed in writing after the meeting has taken place. If the client declines to have anyone present, this is also documented and confirmed in writing
- Where legal terminology must be used, we take care to ensure that our client understands what has been said and will not proceed until we are satisfied and that our client is comfortable
- We will take steps to make ourselves aware of any potential capacity or physical limitations such as mobility, continence, hearing or visual impairment. These matters are always considered when meeting and communicating with older clients
- Correspondence and documentation can be produced in large print if necessary
- In all cases, the pace and duration of each meeting is aligned to the needs of our client
- Where appropriate, we will offer to visit our client's home. However, if a client visits our office, we will let them know what disabled parking facilities and access are available.
- We are sensitive to the possibility that older clients may be discomforted if they do not have current passports or driving licences. Extra care is therefore taken not to cause our clients any embarrassment, while ensuring that money laundering requirements are met.
- We ensure that all relevant facts are noted in our attendance note of any meeting

For further information please email us:

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