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OLDER AND VULNERABLE CLIENT CARE PROCEDURE

At Adviser Legal we pride ourselves on treating all clients with dignity and respect and take care in identifying the needs of each individual client. We appreciate that our older clients, often require additional consideration and we aim to ensure that we take account of any additional needs they may have ensuring we are sympathetic and sensitive to any issues at all times.

Prior to our meetings we will ensure that our client is aware of the time and place of the meeting and that they have been informed of any documents they will need to provide.

We will enquire about any additional needs such as physical or potential mental limitations prior to the meeting in order to make any arrangements which may ease such issues.

Due to the nature of our discussions, meetings will take place with the client alone, however, we appreciate that often a client will wish for a friend or relative to initially be in the meeting to put the client at ease and we can accommodate this, however, the main points of discussion will need to be made with the client alone. We aim to make meetings as relaxed and friendly as possible and at a pace that suits the client.

Where the client has physical limitations such as visual or hearing impairments we will seek to communicate in the best possible format to ensure the client's understanding. If English is not the client's first language it would be suggested that an independent interpreter is used.

During our client meetings we endeavor to discuss all matters in a way in which it is easy for the client to understand and try to avoid too much legal jargon. We will regularly check the understanding of the client throughout the meeting and ensure that they are happy with what has been discussed.

At the end of our meeting we will discuss with the client the best format for sending further documentation to them (taking into account any physical disabilities) and we will not send anything to any third party such as a friend or relative without the client's consent.

Full notes are made in writing of all client meetings which will include details of the people present, the matters discussed and comments on the client's contribution, understanding and manner.

Due to money laundering requirements all clients will be asked to provide the necessary ID documents, however we are mindful that not all older clients have the necessary ID or are able to use electronic ID verification software and we have procedures in place for alternative arrangements.