



LEGACY LAW

PROTECTING YOUR LEGACY

Older and vulnerable client care policy

Every client is important to us and we endeavour to ensure that the customer experience for everyone is excellent.

However, we realise that it is especially important to treat older and vulnerable clients, their families and representatives, with additional consideration.

We do this by being both sympathetic and sensitive to any issues they may have. We also ensure that our firm and our staff treat older clients, their families and representatives with dignity, kindness and respect at all times.

There are eight keys ways we achieve this:-

1. Client meetings

Due to the nature of the advice that we may need to give, it is important that we can see our client alone initially. This is because of client confidentiality and the need to ensure that the client is giving us instructions directly and without undue influence or coercion playing a part.

However, we appreciate that some clients may prefer to have 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.

In all cases, the pace and duration of each meeting is aligned to the needs of our client.

For all meetings, we will offer to visit our client's home. Alternatively, we can arrange meetings by video conferencing.

2. Communication

Where English is not the first language of our client, or they have 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. Any such person will be independent.

Correspondence and documentation can be produced in large print or Braille if this is helpful.

3. Records

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.

We ensure that all relevant facts are noted in our attendance note of any meeting.

4. Plain English

Where legal terminology has to 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. All our communication, whether written or verbal, is in plain English.

5. Adaptations

We want all clients to be comfortable during meetings. For this reason, we will ask about 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 and vulnerable clients. We will ask clients if there is anything we can do to make their experience with us easier.

6. Documentation

We are required to identify all clients to comply with legislation. However, 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, by providing other options for the ID process if this proves necessary.

7. Attorneys

We ask that any person signing in the capacity as attorney for our client should also produce proof of ID for identity verification purposes.

8. Flexibility

Every client is unique and has individual needs and concerns. At Legacy Law we are flexible and will work with you to achieve your objectives and ensure that the experience you receive with us is both positive and supportive.