Dealing with vulnerable clients

The firm has a Vulnerable Client Care Protocol which has been drawn in accordance with the requirements of Solicitors for the Elderly. This can be found at Appendix T and on the website. The protocol will be reviewed regularly and amended in accordance with the requirements of Solicitors for the Elderly.

APPENDIX T – VULNERABLE CLIENT CARE PROTOCOL

- 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 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 to give, it is important that we can see our client alone initially. 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.

- Where English is not the first language of our client, or the client has difficulty hearing or with sight, we suggest that an appropriate independent interpreter, or a person that our client trusts assists the client to 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 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 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 taken into account when meeting and communicating with older clients.

- Correspondence and documentation can be produced in large print or Braille 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 him know what disabled parking facilities and access are available and ensure that toilet facilities are readily accessible.

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

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

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